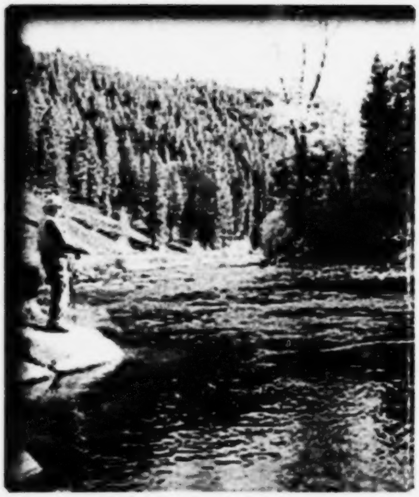
Williams Lake Forest District

Tourism Opportunities Study

April, 2001



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- **Forest Renewal BC** – Kate Greskiw (Chair of the LAC)
- **Ministry of Forests** – Anne Smith
- **BC Parks** – Murray Carruthers
- **British Columbia Assets and Lands** - Lisa Young
- **Cariboo Regional District** – Gordon Gillette
- **Cariboo Chilcotin Coast Tourism Association** – Jennifer Case
- **City of Williams Lake Economic Development Commission** – Trevor Kier
- **Community Futures Development Corporation of the Cariboo Chilcotin** – Doug Frankiw
- **Ministry of Environment, Lands and Parks** – Roman Navratil
- **Ministry of Small Business, Tourism & Culture** – Tim Barry
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- **Red's Shreds Bike & Board Shop** – Mark Savard
- **Legends Rod Company and the Fly Shop** – Dallas Abe

We are grateful for the assistance received from the representatives of community organizations, recreation groups and tourism operators listed in **Appendix B**, who provided key input into the study. We would also like to thank the travel trade representatives listed in **Section 7**, who contributed their valuable time and expertise in the assessment of the ecotourism opportunities available in the study area.

Finally, we thank the government agencies which provided funding for the study, namely the Ministry of Small Business, Tourism & Culture, Forest Renewal BC, and the Ministry of Agriculture, Food & Fisheries.

List Of Acronyms

ABC	Aboriginal Business Canada
AGM	Annual General Meeting
AGOP	Angling Guide Operating Plan
ATBC	Aboriginal Tourism Association of British Columbia
ATTC	Aboriginal Tourism Team Canada
B&B	Bed and Breakfast
BCAL	British Columbia Assets and Land Corporation
BCEAD	British Columbia Environmental Assessment Office
CCCTA	Cariboo Chilcotin Coast Tourism Association
CCLUP	Cariboo Chilcotin Land Use Plan
CEAF	Cariboo Economic Action Forum
CFDC	Community Futures Development Corporation
CoC	Chamber of Commerce
CRD	Cariboo Regional District
CTC	Canadian Tourism Commission
CWL-EDC	City of Williams Lake Economic Development Commission
EAO	British Columbia Environmental Assessment Office
ERDZ	Enhanced Resource Development Zone
FishRBC	Fisheries Renewal British Columbia
FIT	Fully Independent Traveller
FRBC	Forest Renewal British Columbia
GRTDC	Gold Rush Trail Development Cooperative
GVRD	Greater Vancouver Regional District
HRDC	Human Resources Development Canada
IRDZ	Integrated Resource Development Zone
LAC	Local Advisory Committee for Tourism Opportunity Study
LRMP	Land Resource Management Plan
MCD	Ministry of Community Development

MELP	Ministry of Environment, Lands and Parks
MoF	Ministry of Forests
MoFish	Ministry of Fisheries
MSBTC	Ministry of Small Business, Tourism and Culture
NORBA	National Off-Road Bicycling Association
PAS2	Goal 2 Protected Area Strategy
PUP	Park Use Permits
RCEP	Regional Community Enterprise Program
RDC	Cariboo-Chilcotin Regional Development Investment Consortium
ROS	Resource Opportunity Spectrum
SRDZ	Special Resource Development Zone
SWOT	Strengths, Weaknesses, Opportunities and Threats Analysis
TBC	Tourism British Columbia
TIA	Travel Industry Association of America
TOS	Tourism Opportunities Study
TWL	Tourism Williams Lake
WLFD	Williams Lake Forest District
WLVIC	Williams Lake Visitor Information Centre
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council

Executive Summary

Study Purpose

The Williams Lake Forest District Tourism Opportunities Study (TOS) is one of a series of sub-regional ecotourism opportunities studies, and form one component of the British Columbia Government's Ecotourism and Adventure Tourism Strategy. The TOS was prepared for the Ministry of Small Business, Tourism and Culture (MSBTC) under the guidance of a Local Advisory Committee (LAC) comprised of representatives of the tourism industry, economic development organizations and government agencies.

The ultimate purposes of the TOS are to: provide information on the main source markets for the Williams Lake study area for ecotourism experiences; identify the ecotourism opportunities within the study area with the best short-term development potential, and; identify the action steps to be taken by key players in tourism development in order to forward the development of ecotourism in the study area.

Overview of Williams Lake Study Area

The Williams Lake Forest District is located in the Central Interior Region of British Columbia. It is one of the five forest districts, which make up the Cariboo Forest Region. The district boundary extends from the Churn Creek Protected Area and the Big Creek Provincial Park in the south to McLeese Lake in the north, and covers 1,250,391 hectares.

Significant features of the study area are the Fraser River and Chilcotin River, grasslands and plateau forests interspersed with wetlands. The study area has a wide array of natural resources including scenic beauty, pristine rivers and lakes, diverse physiographic and wildlife resources, backcountry wilderness areas, varied and accessible terrain, and unique natural features such as the Fraser River Grasslands and Farwell Canyon.

The largest population centre in the study area is the City of Williams Lake, which is the principal service and trading centre for the region and had a population of 12,000 in 1999. There are six First Nations communities in the Williams Lake study area: Xatl'tem (Dog Creek), Xats'ull (Soda Creek), T(l)exelc (Williams Lake), Esketemc (Alkali), Tl'esquox (Toosey Band at Riske Creek) and Stone Band.

The Williams Lake study area's economic base includes forestry, wood manufacturing, transportation, mining, cattle ranching, tourism service industries and government agencies. With many lakes and sports species of fish and game in the area, sports fishing and hunting operations are well established.

Transportation services in the study area are well developed, and include air, railway and bus service. A number of tourism and economic development agencies and programs serve the tourism industry: the Williams Lake InfoCentre, the Cariboo Chilcotin Coast Tourism Association, the City of Williams Lake Economic Development Commission, the Cariboo Economic Action Forum, the Regional Community Enterprise Program and the Community Futures Development Corporation of the Cariboo Chilcotin.

Tourism and Crown Land Management

Provincial government ministries and agencies which play a role in ecotourism development in the Williams Lake study area include the British Columbia Assets and Land Corporation, the Ministry of Environment, Lands and Parks, the Ministry of Forests, Forest Renewal BC, BC Fisheries, Fisheries Renewal BC, the Ministry of Small Business, Tourism and Culture and Tourism British Columbia.

Land use, including tourism development, in the Williams Lake study area is guided by the *Cariboo-Chilcotin Land Use Plan* (1994) (CCLUP) and various other documents associated with the land use planning process, namely the *Cariboo Chilcotin Land Use Plan Ninety-day Implementation Process Final Report* (1995), the *Cariboo Chilcotin Land Use Plan Integration Report* (1998), the *South Chilcotin Sub-Regional Plan* (2000) and the *Williams Lake Sub-regional Plan* (forthcoming). While tourism can take place anywhere in the study area, the CCLUP gives higher priority to tourism development in the South Chilcotin and Taseko Lake Special Resource Development Zones and the protected areas, namely South Chilcotin Park, Big Creek Park and Churn Creek Protected Area.

General habitat and wildlife concerns are relevant to tourism development in the study area. Restrictions on tourism activity are species and site specific and proposed activities are reviewed by British Columbia Assets and Lands Corporation on a case by case basis.

Global and Provincial Tourism Trends

The analysis of global and provincial tourism trends conducted as part of the TOS process reached the following conclusions related to tourism development in BC and the Williams Lake study area:

- The rapid growth of the ecotourism sector in recent years and current market trends indicate that demand for ecotourism experiences, including nature, adventure and cultural tourism experiences, will be strong in the coming years.
- Canada and BC have the attributes needed to attract the ecotourist. BC has a competitive advantage in attracting ecotourists based on the combination of its natural attributes, including diverse wildlife, scenic landscapes, varied terrain and a rich cultural landscape, and the existing high level of market awareness of BC as an ecotourism destination.
- The North American and European markets are key target markets for BC and Williams Lake study area ecotourism experiences. BC and US residents are particularly important target markets because they comprise the majority of visitors to BC and have a high propensity to participate in nature experiences. Given their higher propensity to spend, their desire for travelling to off the beaten track destinations and their interest in nature and culture experiences, Germans are among the most important European target markets for BC and the Williams Lake study area. Another important European target market is the UK.
- North American and European ecotourists have common characteristics, needs and preferences that must be considered for product development. These characteristics indicate that product development in BC and the Williams Lake study area should focus on developing experiences that combine nature and culture and those providing an experiential, participatory experience. Thematic tourism products should also be developed. To meet ecotourists' preferences, new accommodation properties being developed for this market should be intimate, adventure type facilities at a mid-level luxury level standard.

Williams Lake Study Area Tourism Context

A tourism operators database for the Williams Lake study area was prepared by Clover Point Cartographics for the Ministry of Small Business, Tourism and Culture to provide input into the TOS process. Based on this database, 37 accommodation properties (including RV/Campground facilities) were identified in the study area. Also identified were the following tourism facilities/ services: seven attractions, 13 festivals / events, six recreation facilities, 17 food and beverage establishments, 13 operations offering land tours / charters, four operations offering air tours / charters, 10 guide outfitters, two recreation equipment rentals and two car rental companies. Most of the accommodation properties and a large proportion of the tourism facilities / services are located in the City of Williams Lake.

The analysis of tourism activity in both the larger Cariboo Chilcotin Coast Tourism Region and the Williams Lake study area reached the following conclusions related to tourism development in the Williams Lake study area:

- There is a wide array of quality natural and cultural resources in the study area that can be capitalized upon for developing the ecotourism sector. These include the diverse physical environment and numerous natural attractions and activities, the interesting Gold Rush history, and the historic and living western and First Nations cultures. The study area's cultural resources and freshwater fishing resources are underutilized in terms of tourism development but hold much potential for future development.
- The supply of visitor accommodation in the region is limited in size and type. Most of the accommodation is concentrated in Williams Lake and the only destination lodge which meets the accommodation preferences of the ecotourist, the Tyee Lodge, has been closed for several years. This implies that the development of a destination lodge may be key to the development of the study area's ecotourism sector.
- The level of competition in the study area's ecotourism sector is relatively low to moderate at this time, indicating that there are opportunities for new product development. This is particularly true in the case of western theme and First Nations cultural tourism experiences.
- BC residents comprise well over half of the visitor market to the region and therefore will be an important market for ecotourism experiences. The Greater Vancouver Regional District (GVRD) market and South BC markets are particularly important resident markets, and hold potential for the development of mini-holiday packages. The regional and European markets are also important target markets for the study area.
- The increase in tour busses registering at the Williams Lake InfoCentre in recent years implies that the area is becoming more popular among this segment of the market, and indicates that the study area should place more emphasis on developing tourism offerings that would appeal to this segment. There are also opportunities for the development of ecotourism packages that meet the needs of the rail and air passenger markets.
- The many opportunities for ecotourism package development implies that operators will require assistance in product development and packaging as well as ecotourism marketing and awareness.

Strategic Framework for Ecotourism Development

The Strategic Framework for Ecotourism Development is a value-added component of the TOS, which is intended to increase the study area community's likelihood of success in converting the identified ecotourism opportunities into actualities. As part of the development of the strategic framework, it was decided that the study area would henceforth be referred to as the "Central Cariboo" for the purposes of positioning the study area in the tourism market.

The figure on the following page overviews the strategic framework, and highlights the interrelationships between the various components of the framework, namely the definition, vision, objectives, positioning, themes and strategic directions for ecotourism development in the Williams Lake study area.

Assessment of Tourism Opportunities

Initially, twenty six ecotourism products and activities with potential for development were identified for the Central Cariboo (i.e., the Williams Lake study area). A preliminary assessment of these opportunities was undertaken by the consultants, including consultations with the travel trade, to identify which opportunities had the best short-term development potential. Based on the preliminary assessment, the LAC determined that the following nine tourism products / activities would undergo more detailed assessment.

- Destination Lodge
- Western Theme Tourism
- Freshwater Fishing
- Horseback Trail Riding
- Mountain Biking
- Hiking
- Nature Observation
- Winter Tourism (cross-country skiing/snowshoeing, dog sledding, etc.)
- Scenic Driving Tours

The preliminary assessment also indicated that Aboriginal tourism has strong short-term development potential for the study area. It was decided by the LAC, however, that Aboriginal tourism would not undergo the same level of detailed assessment because there was almost no Aboriginal involvement in the study process, although representatives of the First Nation communities were invited to participate on the LAC. The LAC and the MSBTC encourage the development of Aboriginal tourism, but recognize that all tourism initiatives must originate and be controlled by the First Nation communities.

Each of the nine short-listed tourism products/activities were assessed on a more detailed basis against five categories of criteria: resource criteria, government policy and planning criteria; market criteria; economic criteria, and; social and community criteria. A number of criteria were applied within each criterion category, and a ranking scale was developed for each individual criterion. In the case of the resource criteria assessment, an optimal locations assessment was also carried out to determine which sub-zones within the Central Cariboo have the best potential for each of the shortlisted tourism products / activities.

Attached in **Appendix J1** of the main TOS report is a description of the criteria and the ranking system used in the assessment. **Appendix J2** of the main TOS report provides the detail of the Optimal Locations Assessment. The following table on pages vi to vii of the Executive Summary summarizes the detailed assessment of each of the nine tourism products / activities.

Strategic Framework for Ecotourism Development in Williams Lake Study Area

Definition of Ecotourism

The definition of ecotourism assumed for the Williams Lake study area, henceforth referred to as the Central Cariboo, is broad in scope in that it includes nature tourism, adventure tourism and culture and heritage tourism. Therefore, opportunities for ecotourism facilities, activities and services may focus on "community" as well as provide recreation of both a commercial and non-commercial nature. However, general mass-market tourism falls outside of this definition.

Vision for Ecotourism

The Central Cariboo's vibrant community-based tourism and recreation industry welcomes and offers visitors opportunities to respectfully experience our rich and diverse natural and cultural heritage through an array of facilities, activities and services that build on our four seasons natural beauty, living Western and First Nations heritage, spirit of volunteerism and sound resource planning practices.

Objectives of Ecotourism Development

Develop a Sustainable Ecotourism Industry	Provide a Rich Experience for Visitors	Diversify the Economic Base

Ecotourism Positioning & Themes

Position the District as "The Central Cariboo"

Four Seasons Nature-based Tourism & Recreation	Western Heritage	Williams Lake as a Service Centre

Strategic Directions

1. Coordination and Capacity Building

2. Programs
- Product development and packaging
- Market development
- Ecotourism awareness and investment promotion

3. Priority Ecotourism Development Opportunities
- Destination lodge
- Western theme tourism
- Freshwater fishing

Williams Lake Forest District Tourism Opportunities Study: Summary of Detailed Assessment of Tourism Opportunities

CRITERIA	Activity/Product				
	RANKING SCALE	**1**	**2**	**3**	**4**
Resource Assessment					
Quantity of associated resource	Low-Moderate-High	L	H	H	H
Quality of associated resource	Low-Moderate-High	H	H	H	H
Optimal resource units	Sub-zones	WL	WL, Gr	WL, Gr	SC, TL
Quantity compared to other BC	Low-Moderate-High	M	H	M	H
Quality compared to other BC	Low-Moderate-High	M	H	H	H
Product frequency in district	Low-Moderate-High	L	M	M	M
Supporting infrastructure	Low-Moderate-High	L-M	M-H	H	M - H
Assessment of Government Policy & Planning					
Tenure / licensing / permits / other requirements	Yes-No	Yes	Yes	Yes	Yes
Market Assessment					
Appeal to existing tourism markets	Low-Moderate-High	M	H	M	H
Market growth trends	Low-Moderate-High	H	M-H	H	M
Origin of potential visitors	BC-N America-International	NA, I	BC, NA, I	BC, NA	BC, NA, I
Compatibility with other products	Low-Moderate-High	H	M-H	M	M
Seasonality	Low-Moderate-High	H	L-M	M	M
Economic Assessment					
Revenue potential based on average expenditures	Low-Moderate-High	H	L-H	L-M	L-M
Employment potential based on nature/ number/ duration of jobs / income levels	Low-Moderate-High	M-H	L-M	L-M	L-M
Capital requirements	Low-Moderate-High	H	L-H	L-M	L-M
Social and Community Assessment					
Compatibility with local recreation & community uses	Low-Moderate-High	M-H	H	M-H	M-H
Compatibility with other economic uses	Low-Moderate-High	M-H	H	M-H	M-H
Community acceptance / local economic development support potential	Low-Moderate-High	M-H	H	M-H	H
Local skills availability	Low-Moderate-High	L-H	H	H	H

** No requirements if on public roads.*

Activity/Product Key:
1 = Destination Lodge
2 = Western Theme Tourism
3 = Freshwater Fishing
4 = Horseback Trail Riding
5 = Mountain Biking
6 = Hiking
7 = Nature Observation
8 = Winter Tourism
9 = Scenic Driving Tours

Sub-zones Key:
BV = Beaver Valley
P = Palmer
Ga = Gaspard
SC = South Chilcotin
WL = Williams Lake
Gr = Grasslands
TL = Taseko Lake

Williams Lake Forest District Tourism Opportunities Study: Summary of Detailed Assessment of Tourism Opportunities

CRITERIA	RANKING SCALE	Activity/Product				
		5	6	7	8	9
Resource Assessment						
Quantity of associated resource	Low-Moderate-High	H	H	M	L-M	M
Quality of associated resource	Low-Moderate-High	H	H	M	M	M
Optimal resource units	Sub-zones	WL, TL, SC	TL, SC, WL	TL, SC	WL, TL, SC, BV	WL, Gr
Regional Quantity compared to other BC	Low-Moderate-High	M-H	M	M	L-M	M
Regional Quality compared to other BC	Low-Moderate-High	M-H	M	M	L-M	M
Product frequency in district	Low-Moderate-High	L	M	M	L	L-M
Supporting infrastructure	Low-Moderate-High	H	H	H	H	M-H
Assessment of Government Policy & Planning						
Tenure / licensing / permits / other requirements	Yes-No	Yes	Yes	Yes	Yes	Yes*
Market Assessment						
Appeal to existing tourism markets	Low-Moderate-High	L-M	M	H	L-M	M
Market growth trends	Low-Moderate-High	M	H	H	M	M
Origin of potential visitors	BC-N America-International	BC, NA	BC, NA	BC, NA, I	BC, NA	BC, NA
Compatibility with other products	Low-Moderate-High	M	H	H	L	L
Seasonality	Low-Moderate-High	M	L	L	L	L
Economic Assessment						
Revenue potential	Low-Moderate-High	L	L-M	L-M	L-M	L-M
Employment potential	Low-Moderate-High	L	L-M	L-M	L-M	L-M
Capital requirements	Low-Moderate-High	L	L	L-M	L-M	L-M
Social and Community Assessment						
Compatibility with local recreation & community uses	Low-Moderate-High	M-H	M-H	H	M-H	H
Compatibility with other economic uses	Low-Moderate-High	M-H	M-H	M-H	M-H	M-H
Community acceptance / local economic development support potential	Low-Moderate-High	H	M-H	M-H	H	H
Local skills availability	Low-Moderate-High	H	H	M	M	H

** No requirements if on public roads*

Activity/Product Key:
1 = Destination Lodge
2 = Western Theme Tourism
3 = Freshwater Fishing
4 = Horseback Trail Riding
5 = Mountain Biking
6 = Hiking
7 = Nature Observation
8 = Winter Tourism
9 = Scenic Driving Tours

Sub-zones Key:
BV = Beaver Valley
P = Palmer
Ga = Gaspard
SC = South Chilcotin
WL = Williams Lake
Gr = Grasslands
TL = Taseko Lake

Based on the analysis of the five categories of criteria, the Destination Lodge, Western Theme Tourism and Freshwater Fishing were deemed to have the best short-term development potential. The conclusions reached in terms of the short-term potential of each of the nine shortlisted products / activities as well as Aboriginal tourism are as follows.

Destination Lodge

The travel trade input indicates that the lack of a destination lodge that provides a variety of ecotourism experiences and is near to Williams Lake is a primary impediment to the development of the Central Cariboo's tourism sector. The Central Cariboo has many of the assets required for a destination resort including a sense of remoteness, high scenic values, unique natural features, interesting parks/protected areas, abundant wildlife, a wide variety of ecotourism activities, and proximity to an air and rail serviced community.

There is potential for the lodge to also be local-serving in terms of providing conference and meeting facilities. This would help with seasonality issues, however careful management would be required to serve both the visitor and local market equally well.

Given that several of the locations identified are on lands associated with First Nations communities, the destination lodge project may provide an opportunity for the First Nations and the larger community to work together to develop the tourism sector.

To obtain further input on the market requirements to be met in a destination lodge, it is recommended that further consultations be held with the travel trade. Of particular importance is the hotel and convention centre on the R.C. Cotton site in the City of Williams Lake, which was first proposed after the travel trade interviews for the TOS had been completed. It may be that this facility, if built, could satisfy the needs of the tour companies' clientele. The travel trade consultations should also address other accommodation facilities upgrades required to meet market needs.

It is very possible that there will be a need to attract an investor from outside the study area to build the destination lodge. This may require the development of a pre-feasibility study that identifies the best location for the lodge, provides information on market demand and requirements, and can be used to present the destination lodge concept to investors. The high costs associated with constructing a lodge and operating it during its initial years of operation, when it may experience significant operating losses, mean that it will be important to attract a well-financed operator who is knowledgeable about operating a lodge or is able to contract the required expertise.

Western Theme Tourism

The development of western theme tourism makes sense for the Central Cariboo because it capitalizes on the study area's best known and most enduring image. Most importantly, western theme tourism differentiates the Central Cariboo from most other regions in BC, and even in Canada, which do not have the historical or contemporary assets to promote this tourism theme.

The study area's many western theme resources lend themselves to the development of single and multi-day interpretive programs, which fits well with the trend today to more travellers wanting authentic, "behind the scenes" experiences. There is the potential to develop various levels of interactive learning programs including "how to…" programs (e.g., be a cowboy for a day), historical re-enactments, cowboy sing-a-longs, poetry readings, ranch tours, branding & roping demos, and covered wagon rides. However, since this tends to be a sophisticated market, success requires that the experiences offered be authentic, high quality and, in many cases, customized to meet individual needs and expectations. In addition, as per the travel trade input, to meet current market demands it will be important that western theme tourism offerings be packaged with other ecotourism experiences to create a multi-faceted experience.

The 1999 *Strategic Directions for Culture and Heritage Tourism in British Columbia* study identified three underlying conditions that must be met for a community to take full advantage of cultural and heritage tourism development. As applied to the situation in the Williams Lake study area, these conditions are:

- **Community Support and Involvement** - The involvement of the local community in developing complementary products and services will be key in advancing western theme tourism in the study area, as will be making existing "western" venues, activities and events more receptive and inviting to tourists. The support of the local community in terms of generating positive word of mouth and influencing visitors and friends to take in cultural heritage offerings will also contribute greatly to making the study area a western theme tourism destination. For example, the local tourism association should compile a schedule of large and small Western theme events so that tourists can partake in them.
- **Attraction Sustainability** - To achieve long term sustainability, cultural heritage tourism products must be developed in harmony with the community's values and aspirations to maintain its own heritage and environment. This implies that the entire community must get behind the idea of making the Williams Lake study area a western theme tourism destination, and that operators involved in product development are careful to obtain input from knowledgeable members of the community as they develop their products and services.
- **Management Commitment and Capability** - To become a western theme tourism destination, cultural and heritage tourism must be an integral part of the tourism agenda in the study area. The study area has shown commitment to cultural tourism in that the Cariboo Chilcotin Coast Tourism Association (CCCTA) has a cultural tourism coordinator and the banding together of communities including Quesnel, Williams Lake, 100 Mile House and Lillooet to undertake initiatives to develop Gold Rush theme tourism. This commitment needs to be expanded to include western theme tourism, and initiatives similar to those pursued by the Gold Rush Trail Development Cooperative should be forwarded. These include the development of a complete inventory of western tourism resources, including built and human resources, investigation of other successful cultural tourism destinations and initiatives, market research and analysis specific to western theme tourism, and development of product development and marketing strategies.

Freshwater Fishing

The Central Cariboo's freshwater fishing resources are virtually untapped compared to other highly productive regions in the province. The study area offers a diversity of fishing opportunities that match the needs of a range of markets, including the competitive fisher, the family fishing experience and the wilderness fishing enthusiast. Given the potential for icefishing, the activity is less seasonal than many of the others investigated in this study. There is also much future potential in the many lakes that are suitable for stocking. These facts combined with market trends indicating that freshwater fishing is increasing in popularity indicate that freshwater fishing is one of the best tourism development options for the study area.

The potential of freshwater fishing for tourism development has been recognized by the CCCTA, which employs a full time sportfishing coordinator to promote the activity and increase the region's market share. CCCTA also works in cooperation with the Ministry of Environment, Lands and Parks to promote the industry through attendance at trade shows in the US and Europe. In going forward, these agencies will need to work closely with the operators and the rest of the tourism industry to determine which markets to target, coordinate product and packaging initiatives, and develop and implement effective media and advertising strategies. To facilitate market development, it is recommended that research be carried out to learn what competing regions have done to develop their freshwater fishing sector.

On the operator's side (e.g., angling guides), information and education is required in areas such as the available markets, product development and packaging, marketing, business planning and customer service. As capital access has been identified as an issue by local operators, information on financing assistance programs will also be useful. To help deal with the capital access issue, the industry as a whole should lobby and work with the government and financial institutions.

Specific initiatives suggested by operators to assist in the development of the sector include working with the airlines to develop special packages for provincial and US sportfishing markets, and development of web pages highlighting sportfishing on the CCCTA web site.

In order that the sportfishing resources are not depleted as the result of angling guide operations and related tourism development, as has occurred in other regions, it is important that initiatives to protect the resource be put into place as one of the first steps in developing the sector. These include informing and educating visitors and operators on resource issues and resource protection and management, and developing a regional resource management plan through industry and government coordination that addresses issues such as which lakes should be stocked, how guiding days should be distributed and limiting the number of users.

Horseback Trail Riding

Its unique history and economy has given the Cariboo region a distinct frontier and western cultural image, and visitors naturally associate horseback trail riding with this image. The region's natural attributes, including its spectacular scenery, varied terrain and diverse wildlife, also contribute positively to the experience.

Considerable background work has been performed on the development of a regional trail network or series of networks in the region. A report prepared for the Cariboo-Chilcotin Economic Futures Committee found that significant economic and recreational benefits would be gained by having a Cariboo-Chilcotin regional trail system. Further investigation of the trail system was performed through Ministry of Forests inventory projects. The system has also been recognized as an economic development priority by the Cariboo Economic Action Forum in 2000 and at the Premier's Summit on Economic Opportunity - Cariboo-Chilcotin in 1999. The latest development in this regard, is a proposal to the Ministry of Community Development for a Coast Mountains Trail System Corridor, which would link the inland Coast Mountains from southeast Tweedsmuir Park to Big Creek to Churn Creek Protected Area and the Fraser River and to the upper Taseko River basin divide with the Bridge River basin. The development of such a network would be helpful for the tourism-related development of horseback trail riding, as well as for hiking, wildlife viewing, mountain biking and other recreation uses.

Horseback trail package development opportunities include developing pack trips featuring wildlife viewing, Aboriginal culture, western culture or other ecotourism activities combined into a themed type of trip and / or day rides from a ranch or accommodation property. For day trips, the operator should be prepared to have riding boots available so they can cater to the visitor who decides to go horseback riding on the spur of the moment. For multi-day trips, equipment such as chaps, sleeping bags, pads and tents should be available and meals should be included. Generally the trails used should be suitable for varying experience levels, and it is important to have well-experienced guides that know the area and its natural attributes and have the ability to work with clients.

To assist with the development of the market, research on market requirements should be carried out and circulated. As well, operators should be provided with access to training in product development and packaging, marketing, business planning, nature and cultural interpretation, and customer service.

Mountain Biking

The Williams Lake area is now becoming known as a mountain biking destination. The topography in the area naturally lends itself to the sport, and local enthusiasts indicate the riding experiences available in the region are among the best in North America. The region's natural attributes and what the local enthusiasts have done to develop the trails give the study area a competitive advantage over other parts of BC.

A positive development is the recent launching of a mountain biking club, which will work to further develop the trails, develop competitive events and promote the sport to locals and visitors. Given the relatively moderate climate of the Williams Lake area, there is also potential to develop winter mountain bike events and tours. The entry of Red's Shreds Bike and Board Shop into the mountain biking tour market will also help to raise the study area's profile as a destination for the activity.

To develop the mountain biking sector, it will be useful to develop guided products, both as stand-alones and as part of multi-activity packages, as well as more events. While mountain biking is a global sport, the majority of participants come from the western United States, especially California and Colorado, and from western Canada. Therefore, it will be important to concentrate marketing efforts on these markets.

Information on the requirements and preferences of these markets should be gathered and disseminated to operators. In addition, it will be important for mountain biking tour operators to receive training in areas such as product development and packaging, marketing, business planning and customer service.

Strategies and mechanisms for maintaining and perhaps expanding the biking trails should also be put in place. Steps should also be taken to manage concerns related to mountain biking including the possibility of conflict with other trail users and stakeholders, such as wildlife observers, hikers and horseback trail riders. These conflicts include safety concerns and social conflicts over the potential for environmental damage and the compatibility of the activity with other recreational pursuits carried out in the same area.

Hiking

With its many trails, varied terrain, high scenic values, and opportunities enroute to view wildlife and study natural history, western history and culture and Aboriginal history and culture, the Central Cariboo has the potential to become a popular destination for hikers.

As discussed in the section on horseback trail riding, considerable work has been done on the development of a regional trail network or series of networks in the region that would be suitable for a variety of recreational use. The further development of such a network would be beneficial for developing the hiking sector. Other trail system expansion opportunities include the extension of the front country Williams Lake River Valley Trail from Scout Island to the Fraser River, which would provide opportunities to develop combined water-based recreation and hiking experiences. There is also the potential to re-create the Fraser River pack horse trails that once stretched from Lillooet to Soda Creek, which could include the creation of a linear park. These trail systems open the door for potential hiking guide operators.

To be successful in attracting segments other than just the provincial hiking enthusiast, the development of a unique theme or themes with a strong interpretive component for the hiking trails will be necessary. Themed hiking experiences and guide operations could revolve around the study area's gold rush heritage, its Aboriginal heritage and culture, its western heritage and culture, or the history, geology and ecology of the region or individual natural attractions, such as the Fraser River or Chilcotin River. Given the variety of hiking trails already developed in the Central Cariboo this potential does exist.

The development of themed trails requires that the tourism industry develops methods to ensure that the trails are well-maintained. In addition, the trails will have to be well-mapped and have good directional and interpretive signage. To facilitate overnight tours, campsites, or trail huts must be available and a reservation system may be required. Operator training in key areas, including trail stewardship, product development, marketing, interpretation and customer service should be provided. In addition, an effective marketing and promotion plan will also be key to the success of the hiking sector.

Nature Observation

Critical resource attributes for nature observation include the presence of wildlife and natural features and ability to access viewing sites. The Williams Lake study area scores quite well in these areas.

Nature observation experiences that could be developed range from self-guided experiences on trails and specially constructed viewing platforms to multi-day commercial guided tours. Guided experiences should include professional interpretive services such as guides and printed materials. These interpretive services should focus on the ecology and geography as well as the bird and animal life of the particular region. Nature observation is also very compatible as either a primary or secondary activity with other ecotourism activities, especially horseback riding, hiking and mountain biking. Other opportunities for nature observation programs include developing workshops and educational tours for school groups and special interest groups. Tours could also focus on wildlife photography tours, including instruction on the skills and techniques of good nature photography.

To facilitate the development of nature observation tourism, a variety of interpretive techniques should be developed in optimal locations. These include things such as placing a series of interpretive signs along a trail, information shelters containing interpretive signs and displays, audio-video presentations that visitors can borrow or buy and interpretive publications, including self-guided tour brochures. In addition, nature observation tour operators should receive interpretive and customer service training, as well as product development and packaging, business management and marketing training.

Winter Tourism

In the Central Cariboo, cross-country skiing is practiced mainly by local residents. There are more extensive trail systems available in other neighbouring areas, particularly the 99-Mile-100 Mile-108 Mile area. This area made significant investments in the development of world-class trails and related infrastructure several decades ago as well as organizing events, including an annual Marathon. These measures together with marketing and promotion have given the area a high profile among cross-country skiers. In contrast, the Central Cariboo's has no profile as a cross-country ski destination. Moreover, the snow conditions are generally not reliable enough in the Central Cariboo to develop more cross-country trails, including ones that could be linked to the 100 Mile House area trails. Consequently, the activity must be focussed on the Bull Mountain Trails which can accommodate additional skiers at this time but do not have unlimited expansion capacity.

The Central Cariboo is also at a disadvantage for offering ski touring. The study area does not have the same quality or quantity of mountains, back country areas, or trail systems available in the neighbouring areas to both the west and east. Moreover, these areas have established reputations as excellent destinations for these activities.

Nonetheless, there is potential to increase winter tourism in the Central Cariboo. For example, existing accommodation properties could also develop packages featuring snowshoeing, ice fishing and dog sledding. They could also partner with other tourism operators to develop winter packages that involve the visitor staying at one of the properties in the study area with day trip excursions to the better known cross-country skiing and ski touring areas that are near to but outside the study area.

The construction of a destination lodge would likely help to develop the winter tourism market. Such a lodge could market multi-activity winter weekend getaway packages aimed at attracting residents from the GVRD and other near-by markets, as well as some international visitors.

There is also the potential to draw more visitors to the area by expanding the Bull Mountain Challenge, and by staging winter mountain biking events. Developing a major winter festival or series smaller events is another option to help increase winter tourism. Programming for such events could include dog sled races, ice sculpting, hay rides, barbecues, cross-country ski events, snowshoe events, and ice fishing derbies.

Scenic Driving Tours

The Central Cariboo contains all of the critical resource attributes for scenic driving tours including the existence of circle tour routes and the presence of interesting features. The diverse topography, high scenic values, unique natural features and cultural and heritage assets of the Central Cariboo mean that all of the two wheel drive roads in the region have potential for scenic driving tours. Opportunities to view wildlife from the roadside are an added bonus.

With effective product development and marketing of touring product, the tourism industry in the Central Cariboo can take better advantage of the considerable highway traffic that already passes through the area, increasing the length of stay of visitors and therefore their expenditures in the community. In addition, fly-drive or rail-drive packages can be developed for visitors entering the area by those modes of transport, and the development of guided touring packages can help to attract the group tour market. Local guided scenic driving tour operations can also be formed, providing the opportunity to those visitors to the area without their own or hired ground transport to appreciate the area's natural wonders.

In order to fully capitalize on the tourism potential of scenic driving touring, however, it will be necessary to address a number of success factors. Since a key factor influencing the touring traveller's length of stay and trip expenditure is having things for them to see and do, the coordination of product development and marketing efforts of the communities and tour operators along the route is very important. Given that there are few built attractions along the routes, the focus of attractions should be the interpretation of the natural and cultural resources.

Equally important to success is that the touring roads are safe and well-maintained for two wheel drive traffic. Since road infrastructure is a government responsibility, this implies it will be necessary for the community to work with the province to obtain the upgrading required on some portions of the routes, including upgrades to the roads themselves and to rest stops and directional and interpretive signage. The community will also need to work with the government, the CCCTA, economic development agencies and private operators to develop and maintain well-designed supporting materials (e.g., clear maps, information and interpretive materials), safe and interesting viewpoints, and road-side services. Other initiatives that will encourage more visitors to take advantage of the routes will be the development of themed routes, short interpretive walks at rest stops, and opportunities to sample local culture and food along the route.

Aboriginal Tourism

There is a diversity of Aboriginal tourism assets available in the Central Cariboo. With these assets as a base, there is potential to develop other built attractions such as traditional villages as well as a wide range of interpretive programs that meet the growing market for "ed-ventures". Examples of such programs include song and dance performances, participatory arts and crafts programs, and nature tours such as herbal walks. There is also potential to enhance and build upon the existing products and services available in the region, such as Xats'ull Heritage Village, the Long House in Williams Lake and the Williams Lake Friendship Society's native gift shop and dining room.

Success in the marketplace requires that the Aboriginal tourism products offered be authentic, high quality, reliable and consistent. To ensure cultural authenticity will require that the following five requirements be met as product is developed, as per the recommendations of Aboriginal Tourism Team Canada:

- Aboriginal people must own and participate in the business
- Traditional and current Aboriginal techniques and methods must be used
- Local customs and culture must be accurately portrayed
- The local Aboriginal community must be involved
- The natural environment and its creatures must be treated with respect

The Local Advisory Committee and MSBTC recognize that the community will need to work closely with the First Nations communities to help facilitate the development of Aboriginal tourism.

Ecotourism Action Plan

The action plan recommendations developed for the TOS are presented in the following figure and include suggested assignment of responsibilities, timing and resources. However, the LAC requested that the action plan not be completed with respect to assigning all responsibilities and identifying partners for support since these are pending on the preferences of the Ecotourism Task Force (a coordinating body which it has been recommended be set up to lead the development of ecotourism in the study area) and the study area's stakeholder base.

Detailed Action Plan by Area

1. Study area-wide Coordination and Capacity Building

One of the key issues identified during the course of the consultation and research relates to the absence of effective leadership in the district to pursue ecotourism sector development. The tourism industry association is linked to other associations and to the provincial tourism agencies on a marketing basis but little is done in the way of product development and support for product development. In order to pursue ecotourism development opportunities, study area-wide, intra-regional and inter-regional coordination and leadership is essential and needs to be addressed. Without it, one can expect that little will be achieved in the way of implementation of the recommendations of this report. First, awareness must be generated about the potential opportunities and work to-date in this regard.

It is recommended that a **task force** for the ecotourism sector be established for the purposes of implementing this action plan, comprising representatives from all stakeholder groups (the ecotourism industry, government, communities, First Nations, and others). The ecotourism industry should chair the task force. By establishing such a coordination mechanism, the profile of ecotourism will also be raised and a focus on ecotourism activity and implementation of this action plan will be enhanced.

Some **capacity building** is necessary to strengthen the ability of institutions to deliver programs as part of the action plan. In particular, it is important that local tourism organizations be strengthened in order to provide the leadership necessary for and through the task force.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
1.1 Coordination Set-up	1.1.1 Invite key stakeholders to public meeting on the draft TOS in Williams Lake on March 12, 2001.	MSBTC, LAC, TOS Consultants	-	I	-
	1.1.2 Present the WLFD TOS, along with those for the three other forest districts in the region and Mid-Coast forest district, at the CCCTA's AGM on April 19-20, 2001	TOS Consultants	MSBTC, CCCTA	I	$
	1.1.3 Conduct a meeting of primary agencies to explore and determine avenues and responsibilities for: a) advancing the TOS through awareness building; b) ecotourism product development; c) identifying champions; and d) forming and empowering the selected mechanisms (e.g., task force) etc.	CWL-EDC	To be determined	I	$
	1.1.4 Build awareness by presenting findings and recommendations of the TOS to a broader stakeholder audience through various avenues (e.g., at AGMs) starting at the study area level, then on to the regional and provincial levels (including funding agencies) in order to solicit input and support and identify/engage champions. (Refer to the Responsibility/Partners list in the Key to Abbreviations at the end of this detailed action plan for potential target audiences.)	To be determined	MSBTC, CCCTA, CWL-EDC, CEAF, TWL/CofC	I	$$
	1.1.5 Discuss with government agencies within/outside the study area where responsibility for ecotourism product development should be assigned (e.g., expand mandates of existing agencies, create new mechanisms, etc.).	To be determined	To be determined	I	$

1. Study area-wide Coordination and Capacity Building (continued)

Program	Action	Responsibility*	Partners*	Timing**	Resources***
1.1 Study area-wide Coordination Set-up (continued)	1.1.6 Reconvene the primary agencies with the objective of developing the mechanisms to implement the TOS, including determining whether the form an ecotourism task force and if so, defining its mandate and awarding it powers, providing and sourcing technical and financial resources and support as required.	To be determined	CWL-EDC, others to be determined	I (aim for March 2002)	$
	1.1.7 Apply to the Ministry of Community Development's "Community Enterprise Fund" for funds to develop the Ecotourism Task Force.	To be determined	MCD	I	$
	Note: The actions which follow below in this plan are required regardless of whether a task force is formed. It has been assumed that a task force is formed with responsibility for driving the implementation of this TOS. Modifications to the assignment of responsibilities in the plan will be required if an alternative approach to delivery is adopted as an outcome of Actions 1.1.1 through 1.1.7.				
	1.1.8 Create and empower an ecotourism sector task force comprising industry and government representatives.	To be determined	To be determined	I	$$$ (annual)
	1.1.9 Consult and coordinate with neighbouring TOS study areas and with other regions in BC to ensure complementarity and consistency among the TOSs, refining the WLFD TOS as appropriate.	Task Force	MSBTC, CCCTA, CWL-EDC, TWL	S	$$
1.2 Capacity Building	1.2.1 Identify the resources available for capacity building from federal, provincial, municipal and private sector sources.	To be determined by task force	To be determined by task force	S	$ - $$
	1.2.2 Develop a web site for the Central Cariboo ecotourism sector to serve as a resource centre for information on product development, training, tourism activity in the study area and in British Columbia, and such other resources as may be appropriate for the study area.	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	1.2.3 Deliver appropriate training programs to support task force activity (e.g., project management, etc.).	To be determined by task force	To be determined by task force	S - M	$$

2. Programs

In order to set a sound foundation for implementing the ecotourism development opportunities and enhancing the prospects for the existing tourism sector, a number of programs following three core streams set out below are recommended. They should be carried out in parallel as they are interdependent.

1) Increasing awareness and understanding of the **product development and packaging** process is essential to strengthening the Central Cariboo's ecotourism sector.
2) Successful implementation of an action plan to strengthen the ecotourism sector cannot be done without a much greater orientation to **market development** for the Central Cariboo. For example, the interview process for this project revealed a consistent and unrelenting message from the travel trade to develop more quality accommodation. Greater exposure to market information, trends and linkages is important, not only for the existing tourism operators, but for potential entrepreneurs. In addition, the positioning of the Central Cariboo as an ecotourism destination should form part of this action plan.
3) **Ecotourism awareness and investment promotion** is oriented to fostering an increased awareness of the benefits of tourism and ecotourism activities for the study area. A key theme should include fostering investment in the ecotourism sector – both by existing operators seeking to upgrade and/or expand and by new operators – all consistent with the study area's strategic framework.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
2.1 Product Development and Packaging Approaches	2.1.1 Deliver packaging seminars and workshops – targeted to the existing tourism sector and potential entrepreneurs and including seminar leaders/speakers from the travel trade.	To be determined by task force	To be determined by task force	M	$$
	2.1.2 Publish examples of best practices in product development and packaging – oriented to the existing and potential tourism entrepreneurs to assist them in reviewing their businesses against examples of best practices and in making appropriate improvements.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.1.3 Hospitality training – deliver in each community and including a tourism awareness component to foster a greater sensitivity to and understanding of tourism's contribution to the social-economic fabric of the Central Cariboo, with additional emphasis in the City of Williams Lake on its role as a service centre.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.1.4 Develop and implement cooperative stewardship programs – involving both industry and government agencies to identify where and under what conditions cooperative stewardship of the resource base can take place. This should include the creation of a demonstration or pilot project to serve as a test case and ultimately a best practice.	To be determined by task force	To be determined by task force	S and ongoing	$$ - $$$

2. District-level Programs (continued)

Program	Action	Responsibility*	Partners*	Timing**	Resources***
2.2 Market Development	2.2.1 Publish packages of information on markets – by origin and by activity wherever possible. This information should be made available to tourism operators and entrepreneurs through the web site suggested under action step 1.2.2 above.	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	2.2.2 Deliver market development workshops – providing workshops for existing and potential tourism operators focusing on market trends, needs and expectations relative to the product mix in the Central Cariboo. These workshops should be structured as working sessions where operators are able to review market development practices ranging from initial positioning of the product to marketing plan implementation.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.2.3 Conduct workshops with the travel trade – perhaps carried out in conjunction with the packaging seminars in action recommendation 2.1.1 above. The theme here is to have the travel trade inform and work with Central Cariboo operators on requirements for products (including service centre-related, e.g., booking centre) they are encountering that meet market needs and expectations beyond those markets already served by the district.	To be determined by task force	To be determined by task force	M	$$
	2.2.4 Re-align Central Cariboo marketing to reflect the strategic framework developed in the project including positioning and market themes for the district. This should also include discussions with Tourism BC to develop an aligned position within the destination marketing undertaken by Tourism BC.	To be determined by task force	To be determined by task force	S and ongoing	$$$
2.3 Ecotourism Awareness and Investment Promotion	2.3.1 Publish the opportunity assessment results for the study area on the web site and in hard copy format. The task force should encourage distribution through government offices at all levels, in addition to tourism industry publications.	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	2.3.2 Deliver business and resource/product planning workshops – targeted to existing businesses seeking to upgrade and/or expand and potential new entrepreneurs. These workshops would provide technical skills, advice and information on business planning, resource planning including the government regulatory regime, and product planning in the context of sustainable use of the resource base.	To be determined by task force	To be determined by task force	M and ongoing	$$

3. Priority Ecotourism Development Opportunities

Each of the nine shortlisted opportunities are appropriate for the study area but it is recommended that certain priorities should be pursued in the Central Cariboo in the short term in order to have the greatest impact in terms of advancing the contribution of the ecotourism sector.

The challenge in setting priorities for the ecotourism development opportunities rests in adopting a **market-driven approach**. No matter how outstanding the resource base might be for any particular activity, if it does not appeal to the market for one reason or another it will simply raise local expectations beyond realistic levels. Product considered critical to the study area's ecotourism sector growth in the short term include a destination lodge, western theme tourism and freshwater fishing. Aboriginal tourism is also considered important for ecotourism development, but can only be addressed in close co-operation with the First Nation communities.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
3.1 Action Plan for Critical Product Development	3.1.1 Develop a strong, market-driven orientation to the priority ecotourism development opportunities in order to refine the specifics to the study area through the following actions: a) Hold a workshop with the travel trade to gather input on both accommodation upgrade and potential new destination lodge market requirements including identification of potential travel trade needs in terms of bookings (i.e., service centre role of the City of Williams Lake).	To be determined by task force	To be determined by task force	S	$ - $$
	b) Gather input from the travel trade on the specific offerings desired with respect to the western heritage theme tourism and including interpretive activities and soft adventure activities such as horseback riding, accommodation, and packaging.	To be determined by task force	To be determined by task force	S	$ - $$
	c) Examine competitive western theme destinations/initiatives to identify lessons learned.	To be determined by task force	To be determined by task force	S	$$
	d) Hold an industry stakeholder workshop on sport fishing product, bringing in travel trade specializing in sport fishing and identifying particular strengths and market niches that should be pursued for the Central Cariboo.	To be determined by task force	To be determined by task force	S	$$
	3.1.2 Hold a training workshop on interpretive planning and techniques for ecotourism product development with particular emphasis on what the study area needs in order to move its product development plans forward. This includes special reference to the western theme tourism and nature interpretation related to activities such as hiking, horseback riding and mountain biking. The purpose of this workshop is to provide tools and techniques for the tourism sector to apply in their own businesses.	To be determined by task force	To be determined by task force	M	$$
	3.1.3 Develop a marketing strategy specifically for sport fishing, taking into account the Central Cariboo's competitive advantage with other destinations in BC based on the results of 3.1.1 above.	To be determined by task force	To be determined by task force	L and ongoing	$$

3. Priority Ecotourism Development Opportunities (continued)

Program	Action	Responsibility*	Partners*	Timing**	Resources***
3.1 Action Plan for Critical Product Development (continued)	3.1.4 Develop a marketing strategy and plan for the Central Cariboo – reflecting the strategic framework approved by the LAC and phased to coincide with the action plan for critical product development. The marketing plan should reflect the results of action recommendation 2.2.4 above.	To be determined by task force	To be determined by task force	M and ongoing	$$$

KEY TO ABBREVIATIONS:

***RESPONSIBILITY/PARTNERS:**

ABC	Aboriginal Business Canada
AtBC	Aboriginal Tourism Association of BC
BCAL	British Columbia Assets & Lands Corporation
BCEAD	British Columbia Environmental Assessment Office
BCP	BC Parks
CCCSC	Cariboo Chilcotin Community Skills Centre
CCCTA	Cariboo Chilcotin Coast Tourism Association
CEAF	Cariboo Economic Action Forum
CFDC	Community Futures Development Corporation
CoC	Chamber of Commerce
CRD	Cariboo Regional District
CWL-EDC	City of Williams Lake Economic Development Commission
ETF	Ecotourism Task Force
FishRBC	Fisheries Renewal BC
FRBC	Forest Renewal British Columbia
HRDC	Human Resources Development Canada
LAC	Local Advisory Committee for Tourism Opportunity Study
MCD	Ministry of Community Development
MELP	Ministry of Environment, Lands and Parks
MoFish	Ministry of Fisheries
MoF	Ministry of Forests
MSBTC	Ministry of Small Business, Tourism and Culture
Private	Private Operators
RCEP	Regional Community Enterprise Program
RDC	Regional Development Investment Consortium
TBC	Tourism British Columbia
TCs	Tribal Councils
TT	Travel Trade
TWL	Tourism Williams Lake
WLVIC	Williams Lake Visitor Information Centre

****TIMING:**

I	Immediate (prior to Task Force creation)
S	Short-term (less than one year after Task Force formed)
M	Medium-term (1-3 years after Task Force formed)
L	Long-term (3+ years after Task Force formed)

*****RESOURCES:**

$	Small amount of funds required (i.e., less than $10,000)
$$	Moderate amount of funds required (i.e., $10,000 to $50,000)
$$$	Large amount of funds required (i.e., more than $50,000)

OTHER:

TOS	Tourism Opportunity Study
WLFD	Williams Lake Forest District

1. Introduction

The growth of ecotourism has presented significant new opportunities for rural communities and operators to develop products matched to the interests of consumers from around the world. British Columbia is particularly well placed for specialy product and, indeed, has made considerable advances in this area. At the same time, there are still many areas of the province, and communities throughout the province, who have not yet been able to take full advantage of these market opportunities.

Recognizing the tourism potential, but also the resource conflicts that arise from tourism use and activities by other industries, the province of British Columbia developed a series of planning processes aimed at resolving these conflicts by establishing the framework for resource activity. The Land Resource Management Plan (LRMP) process is the centerpiece of this program and has set a broad context in most regions in the province. Tourism interests have been represented through participation by local and regional participants in the planning process and supported by inventories of tourism suppliers and resource interests. Beginning in 1991, these tourism and resource inventories have been mapped and analyzed by the Ministry of Small Business, Tourism and Culture (MSBTC).

The Williams Lake Forest District Tourism Opportunities Study (TOS) is one of a series of sub-regional ecotourism opportunities studies that build on this prior work and form one component of the British Columbia Government's Ecotourism and Adventure Tourism Strategy, which is part of the Government's Green Economy Initiative, announced in 1999/2000. The Ecotourism and Adventure Tourism Strategy follows three major themes:

- Community Focus – work with communities to create new opportunities
- Industry Focus – work with industry to promote product quality and best practices
- Governance – within Government, streamline regulation and improve access to land and resources

The Tourism Opportunities Studies (TOS) program is one of several programs and initiatives falling under the Community Focus theme.

1.1 Study Purpose

The emphasis of the TOS is the emerging ecotourism sector. The ultimate purposes of the Tourism Opportunities Study are to: provide information on the main source markets for ecotourism experiences; identify the ecotourism opportunities with the best short-term development potential within the Study area, and; identify the action steps to be taken by key players in tourism development in order to forward the development of ecotourism in the Williams Lake study area. In addition, the study is meant to act as a useful resource for several different groups involved in tourism planning and development, as follows:

- Local Municipalities, First Nations and Tourism and Economic Development – the TOS provides them with an action plan to assist in the development of the tourism sector in the study area and in encouraging private sector investment in tourism development;

- Entrepreneurs – the TOS provides background research on tourism markets, opportunities, issues and constraints, and information on the geographical areas within the study area most suitable for various tourism activities; and
- Crown-Land Managers – the TOS can be used by government ministries involved in approving or regulating backcountry use – such as the BC Assets and Lands Corporation (BCAL), the Ministry of Forests (MoF) and the Ministry of Environment, Lands and Parks (MELP) – to help them understand the interests of existing tourism operators and for information useful in various planning and management processes.

1.2 Study Scope

The scope of the Tourism Opportunities Study involved a number of components, completed in two phases. Phase I was performed by Clover Point Cartographics and involved the following components:

- **Tourism and Recreation Resource Database** – this process included the preparation of an updated inventory of the natural features and tourism resources which would be of interest to tourism promoters and investors, communities and First Nations, and tourism operators;
- **Tourism Operators Database** – this process included the identification and inventorying of existing operators in the region, their products, their geographical areas of interest, and the locations, features and facilities important to their operations; and
- **Map Compilation** – tourism/recreation existing use and features maps were prepared based on the Tourism and Recreation Resource and Tourism Operators databases.

This preliminary work provided the basis for the several aspects of the current study. Namely, these are: the tourism resource information (**Section 5.2** and **Appendix G**); the product frequency overview included in the assessment of each of the shortlisted tourism opportunities (**Section 7.2**); the assessment of optimal locations for each of the tourism opportunities (**Section 7.2** and **Appendix J2**), and; the tourism/recreation existing use and features maps (**Appendix K**).

Phase II of the TOS was completed by ARA Consulting, and involved the following components:

- **Research and Analysis** – included detailed background and contextual research on key issues affecting tourism development in the study area, including relevant tourism trends, key tourism markets, and land use and resource planning development activities in the study area and their implications for tourism development;
- **Opportunity Identification and Assessment** – based on the Phase I work and the background and contextual research and analysis, identification and assessment of the ecotourism opportunities having the best short term development potential for the study area;
- **Strategic Framework for Ecotourism Development** – this value-added component was beyond the scope of services specified in the Terms of Reference for the TOS. The strategic framework includes a vision for ecotourism, objectives of ecotourism development, ecotourism positioning and themes, and strategic directions for ecotourism development; and
- **Local Tourism Development Action Plan** – preparation of an Action Plan including specific strategies and actions that local groups and agencies could undertake to facilitate expansion of the local ecotourism sector.

1.3 Study Methodology

The work plan for the Williams Lake Tourism Opportunities Study involved four phases and the following key activities:

Phase I

- **Project Preparation** – included start-up telephone meeting with the LAC, review of background materials and preparation of background materials
- **LAC Workshop #1** – review of background materials, review of proposed consultation process, and determination of overall study direction and process
- **Situation analysis** – desk research and community consultations on the study area's physical and natural resource base, socio-economic profile, local tourism industry and support infrastructure, organizational framework, and global and local ecotourism trends and markets

Phase II

- **Opportunities Identification and Overview Analysis** – identification and preliminary analysis of the key ecotourism opportunities available in the study area
- **Travel Trade Interviews** – interviews with select travel trade representatives to "test" the identified tourism opportunities
- **LAC Workshop #2** – selection of study area's positioning, principal product themes, and the short list of key tourism products / activities
- **Detailed Opportunities Analysis** – detailed analysis of shortlisted tourism products / activities

Phase III

- **Draft Strategic Framework & Action Plan** – preparation of overall strategic ecotourism development framework and action plan strategies and implementation initiatives
- **LAC Workshop #3** – refinement of strategic framework and action plan
- **Draft final report** – preparation of the draft final Williams Lake Forest District Tourism Opportunities Study

Phase IV

- **Public Presentation** –presentation of the TOS at a public meeting
- **LAC Workshop #4** – review public input and recommendations for modifications to the final report
- **Final report** – preparation of the final Williams Lake Forest District Tourism Opportunities Study, including all appendices and mapping

2. Overview Of Williams Lake Study Area

The Williams Lake forest district (Williams Lake FD) is located in the Central Interior Region of British Columbia. It is one of the five forest districts, which make up the Cariboo Forest Region. The Forest District boundary extends from the Churn Creek Protected Area and the Big Creek Provincial Park in the south to McLeese Lake in the north. The Forest District covers 1,250,391 hectares. The area has a typical continental climate: cold winters, warm summers, and maximum precipitation in late spring or early summer. Significant features are grasslands and plateau forest interspersed with wetlands.

The Fraser River is in the centre of the Williams Lake forest district. It flows north to south through canyons cut into the Interior Plateau by receding glaciers. Known as the Fraser Basin, the area along the Fraser River and its tributary, the Chilcotin River, covers portions of the Cariboo and Chilcotin Plateaus and the Fraser "badlands" lying between them. Grasslands and interior dry belt Douglas fir forests are predominate in this area. The climate is much hotter and drier than other parts of the district.

West of the Fraser River, the Chilcotin Plateau, a level to gently rolling landscape with elevations of 900 to 1500 metres, covers the largest part of the study area. The plateau is characterized by its extensive lodgepole pine forests and many lakes, providing abundant wildlife, habitat, and recreational opportunities.

The Cariboo Basin and Cariboo Plateau located between the Fraser River and the eastern boundary of the Williams Lake forest district are known as "transition" areas. Climate and vegetation change from the drier Fraser Basin in the west to the more moderate, wetter climatic conditions areas to the east. Close to the Fraser River corridor are found Douglas fir forests. Further east, tree species include hybrid white spruce, subalpine fir, Douglas and lodgepole pine.

2.1 Climate

The climate in the Williams Lake region is described as Interior Continental climate, and there are four distinct seasons. The following information represents average readings taken at the Williams Lake Airport.

Rainfall: 40 cm. per year

Snowfall: 145 cm. per year

Average Temperatures: July 22°C. January -10°C.

Average Frost Free Days: 120

Growing Season: Late May to mid-September

2.2 Natural Resources

Vegetation

The pine forests of the Chilcotin Plateau, the Interior Douglas fir forests in the Cariboo basin, and the grasslands and dry Douglas fir forests of the Fraser River Basin characterize the Williams Lake Forest District study area. Spruce and Sub-alpine fir forests are found in the Cariboo Basin and Cariboo Plateau located between the Fraser River and the district's eastern boundary.

Of the fourteen biogeoclimatic zones in the province, each which are named after the climax vegetation, seven are found in the Williams Lake Forest District. Vegetation found in each of the seven zones includes the following:

- Alpine Tundra Zone – Dwarf shrubs, herbs, lichens, mosses, wildflowers
- Bunchgrass Zone - Bluebunch Wheatgrass, big sagebrush
- Englemann Spruce-Subalpine Fir Zone (Very dry and cold, Big Creek variant) – Dominated by Lodgepole Pine; understory of Subalpine fir, Englemann spruce, Common juniper, lupine, dwarf blueberry, arnica, ground lichens.
- Interior Douglas Fir Zone - Douglas fir, soopolallie, kinnikinnick (bearberry), Pinegrass and Feathermoss
- Montane Spruce Zone – Lodgepole pine, crowberry, grouseberry, feathermoss
- Sub-Boreal Spruce Zone – Douglas fir, Lodgepole pine, hybrid white spruce, Saskatoon berry, prickly rose, spirea, black huckleberry, false sarsaparilla, pinegrass
- Sub-Boreal Pine Zone – Lodgepole pine, white spruce, common juniper, kinnikinnick, pinegrass, lichens

Mineral Deposits

In the Williams Lake study area, the southern and eastern parts of the South Chilcotin area have a long history of mineral exploration and development. Important discoveries to date include the Poison Mountain copper-gold deposit and the Blackdome gold deposit (a past and present producer). Among industrial minerals, the Frenier perlite deposit has been worked in the same area. Gold placer mining claims are located along the Fraser River at the confluence of the Churn, Borin and Fairless Creeks and on the upper slopes of Blackdome Mountain.

Wildlife and Fisheries

The Williams Lake study area has a wide range of wildlife. Mule deer, moose, California Big Horn sheep are the main ungulate (hoofed animal) types. California Bighorn sheep winter near the Chilcotin and Fraser Rivers with a large herd inhabiting the Junction Sheep Range Park. Other important large mammals in the Williams Lake study area include cougars, Grizzly bears, black bears, black-tailed deer, elk, coyotes and wolves. Small mammals include red fox, lynx, bobcat, fisher, martin, yellow-bellied marmot, weasel, snowshoe hare, chipmunk, flying squirrel and beaver.

The range of habitat from the wetland complexes of the Chilcotin and Cariboo Plateau to the dry grasslands of the Fraser Basin provides the Williams Lake study area with a large number of birds and waterfowl. Golden eagles, bald eagles, owls, ospreys, ducks, geese, swan, hawks, falcons, white pelicans, blue birds and many other species of small birds are present in the study area.

A variety of fish species are present in the numerous rivers, lakes and streams of the Williams Lake study area. These water bodies support populations and/or rearing habitats for anadromous and freshwater species such as Kokanee and Chinook salmon, Steelhead, Sturgeon, Rainbow Trout and Bull Trout. Salmon stocks in the Chilcotin River and the Fraser River support native, sports, and commercial fisheries on a provincial basis.

Water Resources

The Williams Lake study area is part of the vast Fraser River watershed. The two major rivers in the area are the Fraser and the Chilcotin. The Ministry of Forests has classified 374 lakes in the study area according to wilderness values, fish habitat capability, the acceptable limits of development within the lakeshore management zone, and the acceptable limits of visual disturbance from sites on and around each water body. The main lakes are Williams Lake, McLeese Lake, Big Lake, the Chimney Lake chain and Gaspard Lake.

2.3 Communities, Population and Economic Activity

2.3.1 Settlement History, Communities and Demographics

The largest centre in the Williams Lake study area is the City of Williams Lake. The city is located on Highway 97, 550 km northeast of Vancouver and 240 km south of Prince George. Williams Lake is the starting point of Highway 20 to Bella Coola, some 465 km away on the west coast of British Columbia.

The original overland route to the goldfields of the Barkerville area was east of Williams Lake from 150 Mile House to Soda Creek where riverboats transported passengers and freight to Quesnel. Williams Lake did not really become a centre until the 1920's. With the improvement of the railroad and more dependable transportation systems, the town developed and diversified.

In 1999 the total population of the City of Williams Lake was 12,000 people. Including the rural sub-divisions that surround the city boundaries and other small settlements within 20 miles of the city, the total population is well over 24,000. Williams Lake is the principal service and trading centre for the Chilcotin area and Bella Coola as well as bedroom communities such as Likely, Horsefly, Big Lake and McLeese Lake. The population of the trading area supplied by the retail and service sector of the city is estimated to be 30,000 people. Population growth levelled off after the 1960's and 1970's expansion of forest, mining and related government and retail service industries. The population growth rate of 2.6% has been relatively consistent and stable over the last few years. (BC Stats, 2000; City of Williams Lake, 1998; City of Williams Lake, 1999; Statistics Canada, no date).

Age statistics show that the population of the City of Williams Lake is generally young, with only 8% over 65 years, compared to a provincial average of 12%. On the other hand, the Cariboo area is below provincial averages in education attainment with a higher percentage of people with less than grade 9 education (9.9%) and a lower percentage of people with a high school certificate or higher (66%) (Statistics Canada, no date).

First Nations Communities

There are six First Nations communities in the Williams Lake study area. Three of these, Xatl'tem (Dog Creek), Xats'ull (Soda Creek), and T(l)exelc (Williams Lake) are members of the Cariboo Tribal Council. Esketemc (Alkali) are an independent First Nation group, while the Tl'esquox (Toosey Band at Riske Creek) and Stone Band near Hanceville are part of the Tsilhqot'in National Government. The Cariboo Tribal Council bands and the Esketemc First Nation are part of the BC Treaty Commission process while the Tsilhqot'in National Government First Nations groups are not.

Esketemc (Alkali Lake)

Alkali Lake consists of nineteen reserves on 3,960 hectares about 70 km south of Williams Lake. The Band population totals 668, with 435 band members living on reserve. The community has a commercial complex housing a store, gas bar, post office, hair salon and offices for Eco-Link Forest Services, a band-run company. Recently, the band was granted a Community Forest License.

Stone Band

The Stone Band has five reserves on 2,147 hectares located west of the Chilcotin River, 105 km from Williams Lake. The band's traditional territory is almost entirely encompassed in the Williams Lake study area. The band population totals 347, and 257 members live on reserve. Local employment is provided by cattle ranching, hay production and forestry related activities.

Tl'esquox (Toosey)

Tl'esquox was allocated four reserves covering 2,582 hectares in 1887. The reserves are located approximately 40 km south of Williams Lake. The band population totals 248, and 137 members live on reserve. The majority of band members reside on Toosey I.R.#1. Economic activities consist of individual farming, cattle ranching, trapping and logging industry activities. The band also holds a woodlot license.

T(l)exelc (Williams Lake)

T(l)exelc is located about 12 km south of the city of Williams Lake. There are 352 band members of which 221 live on reserve. T(l)exelc has 1,927 hectares of land. The band owns and operates a number of economic enterprises. The businesses are a gas station/convenience store, a re-manufacturing wood products plant, the Chief Will-Yum RV and Campsite, a woodlot license and a logging company, Borland Creek Logging. There are also private entrepreneurs in the community who are involved in ranching, silviculture and logging contracting, food services catering, child-care provision, construction contracting and traditional arts and crafts production and sales.

Xatl'tem (Dog Creek / Canoe Creek)

Xatl'tem is made up of two communities, Dog Creek (in the Williams Lake Forest District study area) and Canoe Creek (in the 100 Mile House Forest District study area). Both communities are located in a semi-remote area 135 km southwest of Williams Lake on the east side of the Fraser River. There are twelve parcels of reserve land totalling 5,582 hectares. The band population includes 650 members, with fewer than 50% of band members living on reserve.

Dog Creek community has a store/gas station/post office. Band members have their own businesses, such as cabinet making, silviculture, vegetable gardening, operating a small sawmill, electrical wiring, beef cattle operations, hay production and catering and bread making.

Xats'ull (Soda Creek)

Xats'ull was allocated two reserves covering 2,093 hectares in 1881. The reserves are approximately 35 km north of Williams Lake on Highway #97. The band population totals 325, with 214 members living on reserve. Individual hay farms, off reserve logging, and the Xats'ull Village Heritage Site generate employment and economic activity. Recently, the band and the community of Likely were granted a joint venture community forest license. The band also holds a woodlot license. Other economic development ventures presently include Xats'ull Logging, Soda Creek Log Homes & Truss and Whispering Willows Campsite & Store.

2.3.2 Economic Base

The Williams Lake study area's economic base includes forestry, wood manufacturing, transportation, mining, cattle ranching, tourism, service industries and government agencies. The three industries employing the most people in the Williams Lake area, according to the 1996 Census, were manufacturing (wood products), retail trade/accommodation and food/beverage services. Public sector jobs (e.g., civil servants, teachers, health-care professional) also account for a sizeable proportion of the economy. The 1996 Census figures report about 2,630 employed in agriculture, manufacturing and other resource-based industries and 3,950 people employed in service industries. The labour force characteristics for the 1996 Census show little change from those collected in 1991. The average household income of people living in the Cariboo area is $47,820 per year, about the same as the provincial average.

Reflecting the lower prices and world demand for commodities coupled with dependency on primary resource industries, the Cariboo unemployment rate in October 2000 was 9.8% with only the North Coast region of the province being higher. The unemployment trend in the Cariboo region showed an increase from the 1995 average of 9.7% to the 1999 average of 11.6%.

Forestry

Forestry related activities dominate the local area with an estimated 65% of the local workforce directly or indirectly dependent on this sector. Of the 5,590 person total workforce in Williams Lake (1996 Census figures), 1,355 were directly employed by the forest industry. A further 2,600 people are dependent on the forest industry for their employment, using the generally accepted multiplier of 2.0[1] to estimate the indirect and induced employment.

There are four major sawmills and a plywood mill operating in Williams Lake as well as a 60MW wood-waste fired power generating plant. The manufacturing plants produce mainly dimension lumber, value added and specialty products. The log home building business is also well established.

In the Williams Lake study area, approximately 1 million cubic metres of timber are harvested annually. In addition, thirty woodlot licensees harvest 30,000 cubic metres annually.

First Nation groups are involved with the forest industry in a variety of ways:

- Band held forest licenses, woodlot licenses and Community Forest licenses
- Co-management agreements with major licensees
- Joint venture agreements with major licensees
- Training programs and business arrangements with log homebuilders.
- Training programs sponsored by government programs, Forest Renewal BC (FRBC) programs and individual major licensees.
- Independent band member owned logging and silviculture companies

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[1] Multiplier applied in PricewaterhouseCoopers, 2000, *The Forest Industry in British Columbia*

Agriculture

In the Williams Lake study area, there are 100 grazing licenses attached to large ranching operations and another 25 to 50 smaller operations. The stockyard facility in Williams Lake, the largest in British Columbia, processes $25 million of value annually, attesting to the strength of the agricultural sector in the region. Statistics for 1996 show that 36,000 head of beef and 2,000 head of sheep are marketed here annually.

The community consistently encourages the "farmers' market" approach for promotion of locally raised food products. The local farmer's market features vegetables, fruit, baked goods, crafts and cheese and plants. Food products produced in the area are being diversified, with new commodities such as farm game, ginseng and Echinacea in production. Local meat, cheese and sausage are experiencing renewed popularity.

Mining

Two major mining developments border the Williams Lake study area. Gibraltar Mines (Taseko Mines Ltd.) and Mt. Polley (Imperial Metals Corporation) produce copper, molybdenum and gold and employ over 550 people when fully operational. While world prices have resulted in the temporary suspension of mining at Gibraltar, the mine owners are firmly committed to re-opening with the advent of improved commodity prices. The feasibility of a smelting operation at the Gibraltar site is being explored.

In the South Chilcotin area the Blackdome gold deposit is a past and present producer. Among industrial minerals, the Frenier perlite deposit has been worked in the same area. Active gold placer mining claims are located along the Fraser River at the confluence of the Churn, Borin and Fairless Creeks and on the upper slopes of Blackdome Mountain.

Trapping

Trapping is a traditional occupation in the Williams Lake study area. At the present time, there are 29 registered traplines in the study area under the management of the Ministry of Environment, Lands and Parks. The areas associated with an additional six to eight lines extend beyond the Williams Lake study area. Furbearer species which are trapped include: mink, marten, weasel, beaver, lynx, squirrel, bear, fox, muskrat, coyote/wolf, otter, bobcat, and fisher.

2.3.3 Transportation Systems

Transportation services in the study area are well developed. The Williams Lake airport is 13 km north of the city. The runway accepts aircraft as large as the Boeing 737 and C-141 Hercules. Scheduled services include daily flights to Vancouver by Air Canada and daily weekday flights to Prince George by Lawrence Air. Other smaller flight operators serve the outlying areas. A floatplane base is also situated a short distance from the city centre, and accommodates chartered flights. There is also a private helicopter service offering charter flights.

BC Rail provides scheduled passenger service three times per week in the summer and two times per week in the remainder of the year from Vancouver to Prince George.

Greyhound Buslines offers daily north and south departures via Highway 97 from Williams Lake to Prince George and Vancouver and waypoints.

Some 29 trucking companies have offices in Williams Lake and four courier services provide local, national and international deliveries.

2.4 Economic and Tourism Development Organizations

There are only a few economic and development organizations in the area that serve the tourism industry specifically. Most of the business development organizations are open to tourism initiatives, as part of the wider business component of the Williams Lake and area economy.

Visitor InfoCentre

The Visitor InfoCentre presently operates year round under the Williams Lake and District Chamber of Commerce and in co-operation with Tourism BC. The services include marketing and promotion at trade shows. Visitor statistics, which become part of Tourism BC's profile, are gathered at the Visitor InfoCentre. The support of the City of Williams Lake and the Chamber of Commerce represents a significant recognition of the importance of tourism to the City's economy.

Cariboo Coast Chilcotin Tourism Association

The Cariboo Chilcotin Coast Tourism Association (CCCTA) is a not-for-profit association of approximately 250 member companies headquartered in Williams Lake. The association is responsible for promoting the positive growth of tourism into the Cariboo-Chilcotin-Central Coast region of British Columbia. The organization works in partnership with Tourism BC to market the region's tourism offerings and ensure proper maintenance of products, services and travel experiences consistent with members' public representation.

City of Williams Lake - Economic Development Commission

The City of Williams Lake, through the office of the Economic Development Commission (CWL-EDC), promotes and encourages the expansion of the tourism industry in the area. Strategy 2000, a comprehensive economic development strategy, outlines what the City hopes to achieve in the future. The needs of the tourism sector outlined in Strategy 2000 include:

- Enlargement of the Visitor Information Centre
- More local campsites and RV sites
- Development of a major tourist attraction in the City such as a Forest and Natural Resource Science Centre
- Development of a convention centre and promotion of meetings, convention and incentive travel to realize the centre's full potential

In addition, the Economic Development Commission is currently working with:

- A community arts and science sub-committee looking at the establishment of a multi-purpose complex in the city
- A private developer who has come forward with a destination hotel, casino and convention centre proposal
- Local tourism-based organizations on a Williams Lake and area marketing strategy
- Local stakeholders on the development of a five-year tourism strategy for Williams Lake and area
- Regional stakeholders on the formation of a Cariboo Chilcotin Film Commission

Cariboo Economic Action Forum

Cariboo Economic Action Forum (CEAF) was initiated in 1994 to develop an economic action plan for the Cariboo-Chilcotin (Cariboo Forest Region) and help the region influence major government initiatives. The CEAF's focus is on economic and employment issues relating to the forest industry and sustainable economic diversification.

The following is a list of CEAF initiatives in recent years that have been beneficial to the tourism industry in the Cariboo:

- Created and marketed a Cariboo-Chilcotin marketing label used by more than 100 regional businesses and groups to increase the profile of goods and services by using a common graphic identity.
- Worked with Cariboo municipalities and the CCCTA to change BC Rail's plans for reductions in passenger rail service to the region.
- Worked with Chilcotin and coastal communities, the CCCTA and the BC Job Protection Commission to successfully lobby for the re-establishment of the Bella Coola ferry run.
- Enabled the Cariboo Chilcotin Trails Society to complete a strategic plan for an integrated trails network linking the entire region. CEAF also acted as a catalyst in completing the final link in the funding effort for the Williams Lake River Valley Project, a major step toward the trails network.
- With the Community Futures Development Corporations and local governments, CEAF set the Cariboo-Chilcotin Regional Development Investment Consortium (RDC) proposal in motion. This organization will act on behalf of business initiatives to obtain venture capital or development funds for high-risk businesses.

Regional Community Enterprise Program

The Cariboo Region Community Enterprise Program is administered by CEAF on behalf of the British Columbia Ministry of Community Development, Cooperatives and Volunteers. This program funds projects, which enable communities to broaden their opportunities for growth and diversify their local economies. The following projects in the Williams Lake study area were funded through the Regional Community Enterprise Program:

- Development of the Gold Rush Trail marketing initiative.
- Development by CCCTA of cultural tourism attractions.
- Tourism initiative by Xats'ull (Soda Creek Band) that will see the upgrading and renewal of three tourism facilities: the Xats'ull Heritage Village, the Soda Creek Restaurant and the Whispering Willow Campground and Store.

Community Futures Development Corporation of the Cariboo Chilcotin

The Community Futures Development Corporation (CFDC) of Williams Lake is an agency in the business of assisting individuals with employment, financial and training services. The corporation delivers a Small Business Loan Program and the Self Employment program to assist clients with the necessary advice direction, information and financing to help start businesses. Community economic development programs and projects are facilitated and initiated to address the issues of economic development and diversification as well as employment development and training.

3. Tourism within Crown-Land Management in the Williams Lake Study Area

3.1 Role of Government Ministries & Agencies

Several ministries and agencies of the Provincial Government of British Columbia which focus on resource management play a major to minor role in tourism. Understanding of their mandates and the nature and extent of their roles in tourism, particularly as they relate to the pursuit of tourism opportunities in the Williams Lake study area, will assist in assigning responsibilities to the required actions to pursue the short listed opportunities in the tourism action plan at the end of this document. To that end, summarized below are their respective mandates and roles in planning, reviewing, approving and/or regulating backcountry and commercial recreation, including tourism.

3.1.1 British Columbia Assets and Land Corporation

British Columbia Assets and Land Corporation (BCAL) is a specialized agency of the provincial government that reports to the Minister Responsible for the Rural Development Office. Its mandate is to make Crown land and assets available for environmentally responsible economic growth and public benefit. It does this through responsible development, marketing and leasing of Crown land for residential, commercial, industrial, agricultural and recreational use. Commercial recreation is recognized by BCAL as important to economic diversification and rural development across British Columbia. With 92% of land in the province held by the Crown, BCAL's responsibility is significant.

Since October 1998, BCAL has been the provincial agency charged with the responsibility of managing commercial recreation on Crown Lands. BCAL's aim is to proactively manage commercial recreation activities and development opportunities. In addition to higher level policies, BCAL has a *Commercial Recreation on Crown Land Policy* (approved and implemented May 1998) to guide management of commercial recreation activities. The goal of this policy is to maintain "an environment that is naturally diverse and healthy, and enriches peoples lives."

Strategic principles guiding BCAL's Commercial Recreation Policy are as follows:

- **Relationship with First Nations** – Provide economic development opportunities for First Nations, and consult with First Nations on commercial recreation proposals, consistent with provincial and ministry guidelines with respect to aboriginal rights and title.
- **Environmental Stewardship** – Protect and maintain environmental integrity, using land and resources within their capacity to sustain use, and maintain biological diversity.
- **Public Access and Use** – Maintain public access to enter and traverse Crown land as a primary consideration in evaluating proposals for commercial recreation. As a general guide, legitimate reasons to manage public access may include the potential for conflict, environmental, and public safety concerns. An additional principle is to provide a balanced mix of recreational experiences, both commercial and non-commercial in nature.
- **Business Certainty** – Ensure that new commercial recreation applications are compatible with the operational needs of existing commercial recreation businesses.

- **Economic Diversification** – Provide for an environmentally sustainable, responsive and vibrant commercial recreation industry. Ensure that commercial recreation operations are considered as integral parts of diversification strategies for communities and regions in transition.
- **Public Consultation** – Involve other interests through a fair, open and consultative process which takes into account locally-established priorities, and public interests, while not fettering the Minister's ultimate decision-making authority.
- **Inter-agency Co-ordination** – Manage Crown lands in an integrated, co-operative and open manner, with involvement from provincial government agencies, local governments, First Nations and the public. Where they exist, use agreements between agencies to develop government responses to commercial recreation proposals. In addition, consider all government commitments for resource use during the review of commercial recreation proposals.
- **Land Use Planning** – Ensure that land allocation decisions are consistent with approved local, regional and provincial land use plans, including strategic plans such as Land and Resource Management Plans, Local Resource Use Plans and local government plans, with special consideration to commercial recreation values identified in these plans.

The Province's Commercial Recreation Policy applies to all forms of outdoor recreation activities authorized by BCAL to be carried out on provincial Crown land on a fee-for-service basis (some exceptions do apply). Such activities include commercial/mechanized ski guiding, commercial hunting and fishing and other commercial recreation activities requiring physical improvements. The policy does not pertain to incidental commercial use of Crown land; commercial recreation activities undertaken within a provincial park, recreation area or protected area (this requires permits through BC Parks) or commercial alpine developments (subject to the Commercial Alpine Ski Policy). Protocols are in place between BCAL, the Ministry of Forests and the Ministry of Environment, Lands and Parks with respect to the approval and adjudication of commercial recreation use proposals for Crown land or activities crossing park or recreation area boundaries into crown land. Public recreation uses of a non-commercial nature proposed for provincial forests are approved by the Ministry of Forests.

The Land Act requires all businesses using Crown Land to be licensed. BCAL must provide commercial recreation operators with permits that give them clearly defined rights to use Crown Land, thereby giving local industry a greater degree of certainty. The licenses, permits and leases granted reflect the classification of the commercial recreation activity: short term investigative uses require investigative use permits, short term low impact uses require temporary permits, long term uses of extensive areas require licenses of occupation, and long term site specific uses require leases. Set out in the policy document for each of the classified activities are the rights granted, applicability, term, pricing structure, client requirements and responsibilities.

At the same time, tenuring and management of Crown land for commercial recreation must be consistent with approved local, regional and provincial land use plans and recreation management plans (see **Section 3.2**).

BCAL's approval process allows time for each application to be reviewed by provincial ministries such as the Ministry of Forests and the Ministry of Environment, Lands and Parks. Local interest groups also provide feedback before BCAL makes a decision. BCAL understands that working cooperatively with other agencies and community groups will help to speed up the referral input and overall application procedure.

One of BCAL's eight regional offices is located in the City of Williams Lake. Management and staff of this office currently place a high priority on being involved in many of the land use studies and plans being prepared within the Cariboo/Chilcotin/Coast Region. Present examples include this Tourism Opportunity Study and other studies underway for Sub Regional Planning, Land and Resource Management Planning and Lakes Classification.

3.1.2 Ministry of Environment, Lands and Parks

The Ministry of Environment, Lands and Parks (MELP) has responsibility across British Columbia for the management, protection and enhancement of the province's environment, including its wildlife, water, land and air resources, its Crown land and its provincial parks, recreation areas and ecological reserves.

BC Parks is the agency responsible under the Ministry for the management of all matters concerning the park system, including maintenance of the provincial park system's campground and trail infrastructure and determining and overseeing appropriate commercial recreation tourism activities in the parks. The purpose of commercial recreation services within parks is to provide park visitors with an opportunity to appreciate the natural and cultural heritage of BC Parks. Appropriate commercially delivered recreation services widen the range of opportunities available to all park visitors. The preservation of park heritage values takes precedence over the provision of recreational opportunities. All services provided by the private sector within a provincial park must be consistent with the approved objectives of that park.

An appropriate commercial opportunity is one which has traditionally been conducted in the park system and/or is deemed compatible with BC Park's values. It allows a park visitor to appreciate the attributes and features of a park in a manner approved by the park management plan and/or park objectives. The opportunity and how it is provided must not conflict with the stewardship mandate of BC Parks, and should take into consideration potential impacts on the park environment and other park visitors. If an opportunity new to the park area is being considered, management may test the appropriateness, the public perception to, and the environmental impact of a service prior to decision of whether or not to issue a proposal package for the opportunity.

When the private sector is invited to provide services to the public in provincial parks, it must result in the maintenance or enhancement of recreational opportunities. Such invitations will be given appropriate public visibility. Exclusive commercial recreation opportunities will be competed for, usually through a proposal call process.

Park management may respond to unsolicited proposals for the commercial delivery of a recreational opportunity by determining, with solicited input where needed, the appropriateness of the proposed recreation opportunity and the commercial delivery of it. The decision will take into account the type of activity, size of operation, anticipated impacts, the existence of previous requests from other proponents, the existence of competing businesses both within and outside of the park offering similar services, and directions provided through a management plan.

In recognition of the actual and potential impact of park based commercial recreation operations on other agencies and/or interests outside, BC Parks will cooperate with BC Assets and Lands

Corporation, National Parks, Provincial Governments, First Nations, various interest groups, corporations, agencies and individuals to achieve park objectives.

The Cariboo Chilcotin Land Use Plan (CCLUP) was announced on October 24, 1994. BC Parks Cariboo District uses this establishment date for the tenuring of Park Use Permits (PUP) for recreational use and commercial operations that pre-date the establishment of the parks. All known and prospective permittees claiming pre-existing operating rights within a new Park or Protected Area must demonstrate they were in existence and operating prior to October 24, 1994.

Many of the protected areas are available, in principle and where appropriate, for commercial tourism and recreation. These development opportunities will be developed during area-specific management planning, which will also recognize the protection of the special natural values of each area and the provision for public non-commercial recreation.

The Cariboo District of BC Parks has its office in the City of Williams Lake.

3.1.3 Ministry of Forests

The mandate of the Ministry of Forests (MoF) is to plan and manage the timber resource to ensure economic and social benefits for the province, immediate to long term. This includes managing, protecting and conserving the forest resources and their recreation values. The recreation program of the Ministry of Forests has a two-fold mission: to provide the opportunity for recreation experiences and benefits by protecting the recreation resource, and to manage the use of the recreation resource. This mission extends to the Crown lands of the province outside parks and settled areas.

This mission is carried out within the context of the Ministry's overall integrated resource management mandate and in cooperation with the recreation programs of other government agencies, public groups and the private sector. The Provincial Forest recreation resource encompasses the full spectrum of recreation values and opportunities, including scenic landscapes, wilderness, cultural and heritage landmarks, and developed recreation facilities.

The Ministry's Recreation Program's goals are threefold. First, to identify, protect and manage the Provincial Forest recreation resource by:

- maintaining an inventory of the recreation resource
- assessing the use, demand and value of forest recreation
- ensuring that recreation (including landscape and wilderness) values are considered in resource management decisions

Second, to manage the public's use of the Provincial Forest recreation resource by:

- developing and maintaining a network of recreation sites and trails
- educating and informing the public about recreation opportunities and the impact of recreation use on other forest resources
- enforcing recreation management policy and procedures

Third, to retain or enhance forest landscape values in keeping with the concepts and principles of integrated resource management by:

- identifying, classifying and recording visual resources and values
- identifying desirable or acceptable levels of landscape alteration
- establishing visual quality objectives for managing visual resources and values
- developing design solutions for meeting visual quality objectives

In terms of Land Use Planning, Ministry of Forests staff are actively involved in the land use studies and plans being prepared within the Cariboo Forest Region. Regional staff chair the Inter-Agency Planning Team for the Sub-Regional Planning processes, and district staff are key members. District staff chaired the Lakes Classification process for the Williams Lake Forest District which was completed in October 2000. The lake classification team consisted of agencies and stakeholders, and was open to participation and input from any interested members of the public.

3.1.4 Forest Renewal British Columbia

Forest Renewal British Columbia (FRBC) is an independent Crown Corporation mandated to manage and direct investments to renew the forest economy of British Columbia. A primary objective is providing support to forest communities that are experiencing major industry and job reduction.

The Communities Business Unit of FRBC currently runs the Forest Community Economic Development Program, with associated investment guidelines, under which tourism initiatives are understood to be eligible for funding.

FRBC provided funding to MSBTC for this and other Tourism Opportunity Strategies currently being developed on behalf of the Ministry of Small Business, Tourism and Culture. The Williams Lake office of FRBC oversees activities in the Williams Lake study area. That office was also responsible for co-funding the development of a mountain biking trail system and mapping as part of the Cariboo-Chilcotin Adventure Field Guide.

3.1.5 BC Fisheries

BC Fisheries, in the Ministry of Agriculture, Food and Fisheries, has direct responsibility for the management of the freshwater recreation fisheries, aquaculture activities, marine plant harvesting and for the regulation, sale, inspection and processing of fish. The province also exercises delegated authority under the federal Fisheries Act for the management of the non-salmon freshwater fisheries and wild oyster harvest. The goal of the provincial Fisheries program is to conserve the natural diversity of fish and fish habitat and to sustainably manage freshwater sport fishing in BC.

3.1.6 Fisheries Renewal BC

An independent Crown Corporation, Fisheries Renewal BC has a legislated mandate to provide all residents, businesses, local governments, affinity groups and tourism operators of British Columbia with opportunities to participate in a meaningful way in provincially-led initiatives directed at fishery renewal and protection. Its current program and strategy priorities are recreational fisheries diversification and development and community-based fisheries job creation. It is currently funding an $100,000 joint sector/government partnership initiative to develop a vision and strategy for the freshwater recreational fishery that is intended to serve as a blueprint for the partners to jointly shape and direct the fishery.

3.1.7 Ministry of Small Business, Tourism and Culture

The Ministry of Small Business, Tourism and Culture (MSBTC) is responsible, under its tourism portfolio, for ensuring that tourism values and interests are recognized and accommodated in resource planning initiatives and policy formulation at the provincial, regional and sub-regional levels in British Columbia as well as in treaty negotiations with First Nations. Most of MSBTC's tourism staff is located in Victoria. However the Ministry has a Senior Tourism Resource Planner based out of Williams Lake who is responsible for the Cariboo-Chilcotin region. The Ministry is responsible for commissioning this and other ecotourism opportunity strategies across the province.

3.1.8 Tourism British Columbia

The mandate of Tourism BC, an independent Crown corporation, has three dimensions: to promote development and growth of the tourism industry, to increase and distribute revenues and employment across the province and to increase the economic benefits of this industry to all residents of British Columbia. It pursues this mandate along several streams – marketing and sales, visitor information services, accommodation services and standards, education and training, research, and business development. Tourism BC has offices in Victoria and Vancouver. It works in partnership with both the Cariboo Chilcotin Coast Tourism Association and the Williams Lake Visitor InfoCentre.

3.1.9 British Columbia Environmental Assessment Office

Subject to legislation, the Environmental Assessment Office (EAO) is the provincial agency responsible for coordinating assessment of the impacts of major development proposals in the province. Sectors for which it undertakes such assessments are broad and include tourism. The purpose of the review process is to identify any foreseeable adverse short or long term impacts of a development proposal from environmental, economic, social, cultural, heritage and health perspectives; to then determine ways to eliminate, minimize or mitigate them; and to then make recommendations to grant or refuse a project approval certificate. Consideration of and decision on the recommendations are then made by the Minister of the Environment, Lands and Parks and a second appropriate minister.

3.1.10 Cariboo Regional District

The role of the Cariboo Regional District (CRD) is to "meet the needs of the residents by providing a wide range of local government services". The CRD provides needed services to rural residents and, in the context of regional services or sub-regional services, services the residents inside municipal boundaries. In the context of this study, the CRD is mandated to provide Planning Services to all areas excluding its four municipalities. Planning Services are delivered in a number of forms including zoning regulations, rural land use bylaws and community plans. Since land use planning regulations apply to both private and Crown lands, proponents should consult with the CRD at the earliest stages.

3.2 Land and Resource Management in the Williams Lake Study Area

3.2.1 The Cariboo Chilcotin Land Use Plan

In October 1994, the British Columbia Government announced the *Cariboo-Chilcotin Land Use Plan (CCLUP)*. A ninety-day process was then initiated to develop technical details for the implementation of the plan, which resulted in the development in February 1995 of the *Cariboo Chilcotin Land Use Plan Ninety-day Implementation Process Final Report*. The Government declared the Cariboo Chilcotin Land Use Plan a higher-level plan under the Forest Practices Code in January 1996. The Government, in June 1999, ordered a variation to the plan outlining access for development. Notice of the adoption of the *Cariboo Chilcotin Land Use Plan Integration Report* (April, 1998) as government policy was given in June 1999. The *South Chilcotin Sub-regional Plan*, which covers land use in the southern portion of the Williams Lake forest district, has been developed in draft form. The *Williams Lake Sub-regional Plan*, which covers the northern portion of the forest district is currently being developed.

The following summarizes key points as they relate to tourism development of the various land use planning documents.

Cariboo Chilcotin Land Use Plan

The *Cariboo-Chilcotin Land-Use Plan* divides the lands in the Cariboo-Chilcotin region into three types:

Private and Settlement Lands: comprise 8% of the region

Protected Areas: comprise 12% of the region

Resource Development Zones: comprise 80% of the region; divided into three zones, depending on intensity of resource development use, principally forestry and mining, as follows:

- ***Special Resource Development Zone (SRDZ)*** – Low intensity resource use areas which recognize the sensitive nature of certain lands outside protected areas that contribute to a range of values including: natural resource conservation and maintenance; resource development and extraction; commercial and non-commercial recreation and tourism; and fishing, hunting and trapping.
- ***Integrated Resource Development Zone (IRDZ)*** – Moderate intensity resource use areas comprised of regional lands designated for sustained integrated resource use.
- ***Enhanced Resource Development Zone (ERDZ)*** - High intensity resource use lands that focus on increasing economic benefits and jobs through intensive resource management and development.

The Williams Lake forest district comprises a portion of the Cariboo-Chilcotin region. In keeping with the Land Use Planning process, tourism development can take place in the Resource Development Zones under the guidelines described in this section, and in the protected areas, as is outlined in this section and in **Section 3.2.2**. While tourism can take place anywhere, the CCLUP gives tourism higher priority in the SDRZs and protected areas, therefore these areas have the best potential as locations for ecotourism activities.

Cariboo Chilcotin Land Use Plan (CCLUP) 90 Day Implementation Process Report (February 1995)

Protected Area Management Policies

General CCLUP direction (CCLUP: Section 5) for new Protected Areas, designated after October 1994, in the Cariboo Forest Region includes the following:

- Dominant ecological values of the protected area will be protected. Uses, such as recreation, cattle grazing (except the Junction Sheep Range Provincial Park), hunting, fishing and trapping are permitted. In principle and where appropriate, Protected Areas are available for commercial tourism and recreation.

- Mining is not an allowable activity except for the placer tenures in Churn Creek Protected Area.
- Commercial timber harvesting and hydro-electric development are not acceptable activities.

Within the Williams Lake forest district, three areas are permanently protected under the Land Use Plan: Churn Creek Protected Area, Big Creek Provincial Park, and Junction Sheep Range Provincial Park.

Zonal and Sub-unit Resource Targets

The *CCLUP 90-Day Implementation Process Final Report* provides the framework for zonal targets for the resource sectors including tourism and recreation. Based on the Recreation Sector Strategy (Appendix 4 of CCLUP 90-Day Implementation Report), the recreation targets and strategies are as follows:

- Maintenance of backcountry recreation opportunities along regionally significant rivers and trails.
- Maintenance of backcountry recreation opportunities in a significant portion of the areas of the region that are presently in a backcountry condition, principally in the Special Resource Development Zone.
- Management for the retention of visual qualities over key recreation resources, including key lakes.

Based on the Tourism Sector Strategy (Appendix 4 of CCLUP 90-Day Implementation Report), and recognizing that the tourism sector is dependent on recreation resources, zonal targets for tourism have been described in the *CCLUP 90 Day Implementation Process Final Report* in the following manner:

- Maintenance of visual quality surrounding existing tourism facilities.
- Maintenance of tourism industry development opportunities in association with backcountry areas.

The strategies to achieve these targets include:

- Maintaining and enhancing the existing diversity of tourism operations within the region.
- Promoting new backcountry facilities in or adjacent to areas to be managed for backcountry use.
- Recognizing the opportunities provided by the major Protected Areas for tourist use.
- Maintaining high quality tourist experience through co-operative access and forest development planning.
- Developing synergies with other resource industries such as ranching.
- Resolving site-specific resource conflicts through participation in sectoral and local planning initiatives.

- Maintaining significant native and non-native cultural heritage resources.

The CCLUP provides direction for applying the zonal targets on a sub-unit basis. The sub-units present in the Williams Lake Forest District are:

Special Resource Development Zones: South Chilcotin, Taseko Lake

Integrated Resource Development Zones: Grasslands

Enhanced Resource Development Zones: Beaver Valley, Gaspard, Palmer, and Williams Lake

For each sub-unit, recreation and tourism targets are described in terms of backcountry area, visual quality, special lakes and access. Direction for biodiversity, fish and wildlife, grazing, wildcraft, and timber harvest management is also provided.

It is important to note that the Government direction on the CCLUP interprets "backcountry" to mean a combination of resource opportunity spectrum (ROS) experience classes including semi-primitive motorized, semi-primitive non-motorized, and primitive. Backcountry does not mean "roadless" or "without development" in all circumstances.

The table on the following page presents a summary (paraphrased) of the application of the tourism and recreation targets to the sub-zones in the Williams Lake forest district. More explicit details are found in *CCLUP 90 Day - Implementation Process Final Report,* Appendix 3: Zonal and Sub-Unit Resource Targets.

Figure 3.1: Williams Lake Forest District Application of Cariboo Chilcotin Land Use Plan Tourism and Recreation Targets

Overlaps	Backcountry Area	Visual Quality Criteria	Lakes	Timber Development	Access
Special Resource Development Zone (SRDZ)					
South Chilcotin					
Recreation and tourism corridors overlap with wildlife habitat areas, lakeshore and riparian management zones. Focus tourism development on backcountry areas.	Maintain 30% of area in backcountry condition including areas above 5000 feet. Backcountry is mainly located in the western portion adjacent to Big Creek Park.	Maintain visual quality in areas adjacent to Big Creek Park.	No specific targets	Primary areas of timber development will be in the central portion of the polygon.	Permanent road access is restricted in 80% of the area. Maintain roaded access to 30% of this polygon.
Taseko Lake					
Recreation and Tourism targets can be met in the alpine. Corridors, key recreation areas and lakeshore/riparian management zones will be designed to compliment wildlife targets.	Maintain 70% of this polygon in backcountry condition including area above 5000 feet and area adjacent to Protected Areas. Focus tourism use/development on backcountry areas identified in recreation targets.	Maintain visual quality in the viewshed surrounding Taseko Lake, Protected Areas, and existing tourism operations.	Manage approximately 2 lakes as quality lakes for wilderness fisheries.	Primary areas of timber development will be in the northern portion of the polygon.	Permanent road access restricted in 90% of this polygon. Restrict road development in north-eastern portion of the polygon. Maintain roadbed access to 20% of this polygon.
Integrated Resource Development Zone					
Grasslands					
Recreation and Tourism values are centred around the large rivers and associated grasslands and overlap with wildlife special habitat management areas. Focus tourism use/development either on river corridors or on the grassland values. Significant opportunity exists to integrate tourism development with existing ranching operations.	Maintain 10% of this polygon in backcountry condition outside of those areas currently reserved from activity.	Maintain visual quality in the viewshed surrounding existing tourism operations, the highway and river corridors. Mule Deer winter range management will overlap with visual quality objectives.	Manage Alkali Lake as key White Pelican habitat. Maintain regionally significant Beecher Prairie pothole habitat values.	Any timber development will have to be co-ordinated with Mule Deer winter range management. Modified harvest regimes will be used over approximately 90% of the forest in this region.	Maintain roaded access to 40% of the polygon.. The majority of the polygon is grassland where access will be walk-in off permanent main roads, or temporary, in conjunction with forest industry development or mineral exploration.

Overlaps	Backcountry Area	Visual Quality Criteria	Lakes	Timber Development	Access
Enhanced Resource Development Zone					
Beaver Valley					
Mule Deer winter range management will overlap with visual quality objectives over most of the key tourism areas.	Maintain 5% of the polygon in backcountry condition: portions of Quesnel and Horsefly Rivers and around key lakes.	Mule Deer winter range management will overlap with visual quality objectives in key tourism areas. Maintain visual quality in the viewshed surrounding existing tourism operations, highway corridors, and key lakes.	Manage approximately 2 lakes as quality lakes for wilderness fisheries.	Modified harvest regimes over 18% of the forest (Mule Deer winter range) in this polygon.	Maintain roaded access to 80% of the polygon. Access to the rest of the polygon will be walk-in off permanent main roads, or temporary, in conjunction with forest industry development or mineral exploration.
Gaspard					
Recreational trail networks can be designed to overlap w ith riparian areas and special habitat management areas.	Maintain 2% of this polygon in backcountry condition.	Maintain visual quality in the viewshed of key lakes and in the viewsheds surrounding existing tourism operations.	No specific targets.	Primary restrictions to timber development will be in the south-western portion of the polygon, adjacent to Special Resource Development Zones. Modified harvesting regimes will take place in 7% of this polygon to address Mule Deer winter range values.	Manage for access management restrictions in areas adjacent to Special Resource Development zones.
Palmer					
Riparian area management will overlap with the management of White Pelican habitat, and key lakes.	Maintain 5% of the polygon in backcountry condition: along portions of Lt. Palmer's trail and around key lakes.	Maintain visual quality in the viewshed surrounding existing tourism operations and the viewsheds of key lakes.	Manage approximately 3 lakes as quality lakes for wilderness fisheries. Manage Rosita and Tautri Lakes for key White Pelican habitat.	Primary restrictions to timber development will be in the central to northern portions of this polygon. Maintain Mule Deer winter range values through modified harvest regimes over approximately 2% of this polygon.	Maintain roaded access to 80% of the polygon. Access to the rest of the polygon will be walk-in off permanent main roads, or temporary in conjunction with forest industry development or mineral exploration.
Williams Lake					
Mule Deer winter range management will overlap with visual quality objectives in key tourism areas. Wildlife habitat areas will overlap with recreational areas and lakeshore management zones.	Maintain 5% of the polygon in backcountry condition: along the Fraser River.	Maintain visual quality in the viewshed surrounding existing tourism operations.	Maintain key White Pelican habitat surrounding Natsy Lake.	The primary control on timber development will be Mule Deer winter range management, modified harvesting, over 50% of the forest in this polygon.	Maintain roaded access to 80% of the polygon. Access to the rest of the polygon will be walk-in off permanent main roads, or temporary, in conjunction with forest industry development or mineral exploration.

The Cariboo Chilcotin Land Use Plan Integration Report

Cariboo Chilcotin Land Use Plan Integration Report (April, 1998) provides more detail on the achievement of recreation, tourism and visual targets of the CCLUP. It also contains direction on applying the strategies for achievement of the CCLUP targets in the process of sub-regional planning. In terms of tourism and recreation it identifies two priority implementation targets:

- Better define backcountry areas through sub-regional planning
- Draft Lake Classification Guidebook

The South Chilcotin Sub-Regional Plan

Completed and accepted by the Regional Resource Board and Inter-agency Management Committee in June 1999, this plan provides management strategies and direction for recreation and tourism in the South Chilcotin sub-region, a 132,000 hectare area which is comprised of the South Chilcotin SRDZ and the West Churn Creek drainage within the Gaspard ERDZ (see map in **Appendix J** for location of South Chilcotin SRDZ and Gaspard ERDZ).

In terms of tourism and management, the plan builds upon the direction provided by the CCLUP as follows:

Direction from the Cariboo-Chilcotin Land Use Plan

For the South Chilcotin Special Resource Development Plan Area the direction is to maintain the visual quality in the areas adjacent to the Big Creek Protected Area (Park).

For the Gaspard Enhanced Resource Development Zone (West Churn Creek), the direction is to maintain the visual quality in the viewshed of key lakes.

For tourism, the direction is to maintain the visual quality in the viewshed surrounding existing tourism operations.

Maintain 30% of the South Chilcotin Special Resources Development Zone in a backcountry condition. In order to be compatible with the timber targets this includes areas above 5,000 feet, and is mainly located in the western portion of the SRDZ, adjacent to the Big Creek Protected Area (Park). Promote tourism development in this SRDZ, and focus tourism use and development on the backcountry areas identified in the recreation targets.

Maintain 2% of the Gaspard Enhanced Resource Development Zone in a backcountry condition, to provide for recreation trail networks.

The sub-regional plan makes recommendations on which areas should be protected as Goal 2 Protected Strategy Areas (PAS2). It also provides detailed direction for: backcountry area, commercial recreation, recreation corridors, visual management, lake classification and access management.

Tourism development opportunities in the South Chilcotin sub-region exist principally in the following areas, the physical locations of which are outlined in the corresponding maps attached in **Appendix C**:

- Big Basin PAS2 Candidate Area – a 500 hectare portion of the Big Basin area has been recommended as a PAS2 area, allowing low impact tourism activity;
- Core and connection backcountry areas – core backcountry areas include the area adjacent to Big Creek south of Piltz Peak, Hungry Valley, Upper Dash Valley and Lone (Beaver) Valley; connection backcountry areas include Quartz Mountain, Red Mountain, Mud/Swartz Road, portions of the Dash/West Churn trail, and Lone Cabin Trail connection to Churn Creek Protected Area. A range of recreational activities from 4X4 to non-motorized access are allowed in these areas, with some restrictions on ATV, motorcycle and snowmobile access;
- Recreation corridors – connectivity corridors along trails or roads, most of which are within the backcountry areas. A range of recreational activities from 4X4 to non-motorized access are allowed in these corridors;
- Lakes – lakes classified as Class B lakes have high fishing, wildlife or recreational values; and;
- Visual management areas – where the visual quality surrounding key recreation is protected. Major recreation features in the South Chilcotin include the trails, recreation corridors, lakes and unique geological features.

The Williams Lake Sub-Regional Plan

This plan is presently being developed and will address tourism/recreation issues in the remainder of the Williams Lake Forest District (excluding the South Chilcotin Special Resource Development Zone) much the same way as the South Chilcotin Sub-regional Plan does. Tourism development opportunities will exist primarily in the backcountry areas, recreation corridors and visual management areas. Negotiations for this sub-regional plan are still underway, but following is a summary regarding proposed visual management areas and PAS2 areas in the sub-region:

- Visual Management Areas:
  - Transportation Corridors – along highways and secondary roads but not logging roads
  - Lakes - in the 200 metre lakeshore management zone around Class A lakes and additional visual management around Class B lakes
  - Rivers - particularly along Fraser and Chilcotin Rivers, based on viewpoints and topography
  - Tourism Operations - around existing tourism operations
  - Taseko Lake - in the one third of the Taseko Lake SRDZ that is within the Williams Lake forest district, visual management will occur along trails and some lakes.
- Protected Area Strategy Areas – areas being reviewed are DeSous Mountain, Dante's Inferno (Crater Lake), Rock Lake, Rye Lake in Beaver Valley, and Fraser Breaks on the west side of the Fraser River.

3.2.2 Parks and Protected Areas Planning

Parks and protected areas that were established in the Cariboo since October 1994 have a wider range of acceptable uses than other parks in British Columbia. BC Parks considers recommendations regarding the levels of acceptable use from public advisory committees on a park-by-park basis. The only activities that are not acceptable in parks and protected areas are logging, mining and hydro-electric development. The Park Act was amended under Bill 53 – 1995 to include the continuation of grazing licenses in protected areas established after October 1, 1994.

Churn Creek Protected Area

The Minister of Environment, Lands and Parks approved BC Parks' *Management Plan for Churn Creek Protected Area* in March 2000. The Churn Creek Protected area will be managed for its nationally significant grassland conservation values. The Empire Valley Ranch is a part of the Protected Area and will continue to operate as a cow-calf ranch operation at its historic levels. An industrial corridor provides access through the Protected Area for logging, mining, and other industrial uses. The right to access private land and placer claims through the Protected Area is confirmed. Hunting, grazing, trapping, guide-outfitting, non-mechanized public recreation (such as hiking and cross-country skiing), primitive camping, non-commercial horseback riding and aboriginal uses are confirmed as permitted uses in Churn Creek.

The following excerpt from the Management Plan provides highlights related to the management of recreation and tourism:

- A staging area for horseback riders and other Protected Area users will be developed at the Calving Barn. A campground may be developed at this site as use warrants.
- A parking lot and interpretive site will be developed near the Empire Valley Ranch headquarters.
- 6% of the Protected Area has been zoned Natural Environment – Motorized to permit vehicle access near scenic areas important for recreational activities.
- 2% of the Protected Area has been zoned Intensive Use/Recreation to permit recreation development and to allow for the continued activities of the Empire Valley Ranch.
- Access has been provided for recreation activities such as hunting, snowmobiling, horseback riding and hiking.
- An informal system of open trails providing non-motorized access to some of the most important and scenic areas will be developed.
- Recreational activities will be monitored for their potential impacts on natural and cultural values.
- Tourism activities such as wildlife viewing, ranch tourism and cultural tourism are generally acceptable in the Churn Creek Protected Area. A bed and breakfast may be developed at the Empire Valley Ranch headquarters.

Because the Protected Area was established principally to protect its ecological values some tourism/ recreation activities will be permitted only under stricter than normal management guidelines. These restricted activities are:

- Mountain biking – restricted to existing roads and trails
- Commercial horse use – primarily day use; restricted to existing roads and trails
- Angling – few fish resources exist; motorboats may not be launched in the restricted area
- Snowmobiling – restricted to routes identified in Management Plan

- Commercial backcountry camps – no permanent structures or facilities, only wilderness style camps permitted

All-terrain vehicles, commercial jet boating and commercial rafting are not permitted in Churn Creek.

The summary of permitted, restricted and not permitted activities and relevant rationale comments has been excerpted from the management plan and is included in **Appendix D.**

Big Creek Provincial Park

Big Creek Park was designated a Class "A" Provincial park in 1995 because of wildlife values, excellent backcountry recreation opportunities, its rich cultural heritage, and its diversity of landscaped and ecosystems from the peaks, valleys and glacial lakes in the south, across the broad expanse of the Dil plateau to the low-lying wetlands in the north. The park is located in close proximity to four other large parks and protected areas in the Chilcotin (Ts'yl-os, Junction Sheep Range, Churn Creek, and Taseko). The linkages between the parks and Special Resource Development Zones, namely Taseko SRDZ to the north and west and South Chilcotin SRDZ to the east, provide a strong ecosystems network.

At the present time the following activities and facilities exist in Big Creek Park:

- Commercial and private trail riding and hiking on an extensive trail network
- Private and guided hunting and fishing
- Cattle grazing throughout the park
- ATV use in the north and eastern portions of the park
- Snowmobile use primarily in the southern half
- Wildlife viewing throughout the park
- Cabins, corrals, outbuildings and camps for guide outfitting and ranching activities
- Hiking and camping
- A trespass airstrip exists south of the Grant and Tosh Creek junctions

It should be noted that access to Big Creek by tourism operators currently occurs mainly from the south, although this may change as logging roads are developed to the north of the park. Horse outfitters, hunting, hiking, and camping take place outside the Park boundaries primarily in the Hungry Valley, Churn Creek and Relay Creek areas. As well, timber harvesting and grazing take place in areas near the boundaries.

Big Creek's significant resources, its relative newness to the protected area system, high levels of recreational and commercial tourism use and the anticipated increase in access due to adjacent development warrant a significant amount of consultation in developing future plans for the park by First Nations groups, commercial operators, recreational organizations and ranchers. During a management planning process, with significant public input, the task of zoning and deciding on the level of use within Big Creek Park will be undertaken. In the interim, BC Parks has developed the *Management Direction Statement for Big Creek Provincial Park*, which was approved in November

2000 and provides guidance on tourism related development. The Management Direction Statement identifies the following in terms of recreation and tourism values:

> The southern area of the park contains extensive sub-alpine and alpine areas and provides a range of excellent backcountry opportunities including horseback riding, hiking, hunting and wilderness camping. The diverse setting offers a number of dramatic vistas and wildlife viewing opportunities throughout the park. The area can be accessed through the extensive network of horseback and cattle trails which connect to trails outside of the park.

The Summary Table of Commitments pertaining to all acceptable uses in Big Creek Park is attached in **Appendix E**. Acceptable tourism and recreation uses, activities and facilities in Big Creek Park are summarized as follows.

Use Category	Acceptable Use
Acceptable subject to conditions identified in management direction statement	Hunting, fishing, horse use/pack animals, hunting guide outfitting, fishing guide outfitting, nature tours guide outfitting, mountain biking
May be permitted if compatible with protected area objectives	River rafting guide outfitting, facility-based commercial recreation, backcountry huts, off-road access snowmobiling

Junction Sheep Range Provincial Park

The Junction Sheep Range Provincial Park consists of rolling grasslands and deeply eroded gullies at the confluence of the Chilcotin and Fraser Rivers. The landscape is a place of spectacular scenery, with cliffs and hoodoos breaking the grassland benches. The park was originally part of a Wildlife Management Area managed by BC Environment. The area is protected most notably because it is the critical breeding, lambing, and winter range of the largest population of non-migratory California bighorn sheep in the world, a blue-listed species. The park contains some of the most natural grasslands in the Cariboo-Chilcotin, providing critical habitat for a number of rare and endangered species.

The park is only open from April 1 to November 30. Access to the park is difficult, via rough gravel roads through private ranchlands. Under the Hunting Regulations, only the access road to the lookout is open to motor vehicles. All motorized vehicles, bicycles, and horseback riders must remain on roads. ATVs are prohibited. There are no developed trails, potable water or picnicking facilities in the park. Overnight camping is not permitted in the Junction Sheep Range Provincial Park or on the private property of Riske Creek Ranching. There are no canoeing/kayaking or fishing opportunities at this park.

At present the following tourism and recreation activities take place, but only to a limited extent, in the park: hunting, wildlife viewing, hiking, horseback riding and mountain biking on undeveloped trails. No management plan has been prepared for Junction Sheep Range Park, and it is likely to be several years until one is in place. To ensure that the park's values are protected, it is unlikely that new tourism uses, activities or facilities would be approved prior to the development of a formal management plan.

Ecological Reserves

Ecological reserves exist to preserve representative and special natural ecosystems, plant and animal species, features and phenomena. Three are three ecological reserves in the Williams Lake study area: Big Creek E.R., Doc English Bluff E.R. and Westwick Lake E.R. With the exception of Doc English Bluff E.R., public use of the ecological reserves is not encouraged.

3.2.3 Wildlife and Habitat Issues

Following is a summary of general habitat and wildlife factors of relevance to tourism development planning in the Williams Lake study area. Restrictions on tourism activity are site specific and proposed activities will be reviewed through the BCAL referral process on an individual site basis:

- **Mule Deer** – management of mule deer winter ranges is a primary concern. In harsh winters mule deer rely solely on old age Douglas fir forests for their survival. They are also sensitive to snowmobiling activity and other tourism activity that causes displacement and fatigue further impacting their survival rates, especially in high snow years.
- **Grizzly Bear** - the ongoing provincial grizzly bear strategy will identify the key conservation and management concerns for protecting grizzly bear. At present, ranges are vast and the locations of key specific habitat sites are unknown.
- **Big Horn Sheep** - the entire Fraser River Valley Corridor is inhabited by sheep. Moderate levels of tourism activity are acceptable, however lambing sites are sensitive to human uses during the lambing season in late May and early June. Access management is required to reduce harassment impacts.
- **Moose** - snowmobiling in their winter habitat areas can lead to direct mortality from fatigue as well as providing an easy snow packed travel corridor for wolves increasing predation success. Access management is required to restrict motorized interference in critical winter areas.
- **Other Wildlife** – identified, red and blue listed species of concern will be identified and conservation management prescribed on area specific sites as warranted.

4. Global And Provincial Tourism Trends

4.1 Global Tourism Trends

According to the World Tourism Organization (WTO), the number of international tourist arrivals between 1995 and 1999 grew by an average annual rate of about 4%. In 1999, there were a total of 664 million international arrivals, an increase of 4.4% over 1998. International tourism receipts in 1999 are estimated at US$455 billion, an increase of 3.1% over 1998 (WTO, August 2000).

In terms of economic impact, the World Tourism and Travel Council (WTTC) estimated that the travel and tourism sector would generate, directly and indirectly, across the world economy 11.7% of GDP and 200 million jobs, representing 8% of global employment. WTTC also estimated that travel and tourism related GDP will grow at 3% annually and create 5.5 million jobs annually over the next decade (WTTC, March 1999).

In the case of Canada, total international arrivals were estimated at 19.5 million in 1999, an increase of 3.7% over 1998. This gave Canada a 7th place ranking among the world's most popular tourism destinations, with a market share of 2.9%. On the expenditure side, Canada's international tourism receipts for 1999 are estimated at US$10 billion, representing a 6.7% increase over 1999 (WTO, August 2000).

Prepared in 1998, the WTO's study *Tourism: 2020 Vision* study looked into the future and predicted that the five following tourism products will emerge as the hottest trends over the next two decades (WTO, 1998):

- **Adventure travel** – with most of the world already being explored, the trend will be for tourists to travel to the world's highest peaks, to underwater sites (such as the Titanic) and places at the "ends of the earth" (such as Antarctica)
- **Cruises** – the cruise sector is expected to expand at the high annual growth rates that have been seen in recent years
- **Ecotourism** – trips containing a nature component will continue to gain in popularity
- **Cultural Tourism** – Europe, the Middle East and Asia are predicted to enjoy especially strong tourism growth
- **Themes** – Thematic tourism, where a special interest is the main travel motivator, is also expected to see strong growth.

4.1.1 North American Market Trends

Trends in the US and Canadian markets that are contributing to the growing demand for ecotourism include (Coopers & Lybrand, 1998; D.K. Shifflet, 1997; Redekop, 1997):

- A new breed of tourist, often called the "New Pioneers", has developed with characteristics and interests that are significantly different from the old breed:

Old Tourists	New Tourists
• search for the sun	• experience something different
• follow the masses	• want to be in charge
• here today, gone tomorrow	• enjoy, not destroy
• just to show that you have been	• just for the fun of it
• having	• being
• superiority	• understanding
• like attractions	• like sports
• cautious	• adventurous
• eat in hotel	• try local fare
• homogenous	• hybrid

- Worn out by today's hectic pace, consumers need to invest in themselves by having more fun and explore new things. This is leading to a trend to more active participation, more frequent trips, and new and interesting locales.
- The new generation of travellers is looking for fun, adventure and life experiences. This is creating an enormous interest in adventure holidays and a boom in travel to exotic destinations offering interesting experiences, cuisine and culture.
- A Back to Basics Movement is underway in the travel behaviour of families. Young and baby boomer families are searching for ways to spend more family time together and for meaning experiences through travel. This is leading to a large and increasing volume of outdoors family travel.
- People are searching for experiences that provide value in a spiritual, educational or physical way. This trend is leading to an increase in ecological tourism, aboriginal tourism, cultural and heritage tourism, and adventure tourism experiences that provide a learning and educational experience.

4.1.2 European Market Trends

Almost a decade ago, new trends in leisure and tourism were showing up, which are today resulting strong demand by Europeans for ecotourism vacations. For the overall European market trends already visible in 1991 included (Travis, 1991):

- **Refreshment through contrast** – urbanites seeking the freedom of rural and open coastal areas, mainlanders travel to islands, lowlanders travel to the uplands, etc.
- **Demand for quality natural-heritage, resource-based experiences** – travellers began to quest for purity and quality, leading to the Greening Tourism Movement and the Blue, or Nautical, Tourism Movement. The Greening Movement involves holidays offering pure water, a clean and safe sea, purer foods and non-polluted air. The Blue Movement involves sail-based sea touring.
- **Demand for cultural and heritage, resource-based tourism** – increased demand emerged for interpretive cultural experiences that respect the values, lifestyle, cuisine and dress of the host people.

- **Demand for rural tourism and agri-tourism** – increased demand also for rural holidays, including working farms, self-catering cottages, and bed and breakfast accommodation in villages and towns.
- **Demand for better health, identity, spiritual and mental renewal** – is fuelling the demand for health-tourism.

In terms of individual markets, more recent studies conducted for the Canadian Tourism Commission show trends towards both more long haul tourism and more ecotourism demand. Within the UK market these trends include (Burkitt Edwards Martin, 1996; Coopers & Lybrand, 1996c; Coopers & Lybrand, 1997c):

- Traditional Mediterranean beach destinations, which are experiencing environmental degradation, are being rejected in favour of new and exotic destinations.
- Growing environmental awareness has increased participation in nature and outdoor related activities. Walking and rambling are now the most popular outdoor activities. The growing environmental ethic and interest in outdoor activities is also being exported, causing a rising demand for travel to "green" destinations and adventure travel.
- UK travellers are increasingly interested in exploring and learning about different cultures as well as sampling local foods and getting to know local people.
- There is a growing interest in special interest travel, including adventure travel, learning vacations and sports oriented travel, at long haul destinations.

In the case of the German market, factors fuelling the growth of long haul travel and ecotourism demand include (Coopers & Lybrand, 1996a, 1996b and 1997b) :

- Emerging interest in long haul travel among former East Germans, who have largely focused on short and medium haul destinations up until now.
- The rapid saturation of European destinations, which is causing sophisticated Germans to turn to long haul travel to expand their horizons.
- An increasing interest among German travellers in experiencing different cultures, learning about foreign countries, and seeing unfamiliar, unusual or exotic destinations.
- Related to rising education levels among long haul travellers, this market is increasingly interested in learning about and experiencing foreign cultures first hand.
- Traditional sun and beach holidays are losing ground in favour of active vacations and special interest holidays (e.g., sporting trips, nature holidays, culture/heritage/history vacations, study tours).
- Holidays that combine two sometimes completely different purposes in a single trip are also becoming more popular, including those that combine nature with culture.
- Environmentally conscious German travellers are starting to actively avoid beach resorts and destinations that are perceived as being polluted or over-run with tourists.

4.2 Ecotourism Trends

At the most purist level, ecotourism can be defined as "responsible travel that conserves the environment and sustains the well-being of local people" (The Ecotourism Society, 1995). In operational terms, however, ecotourism focuses on interpretation and understanding of the environment and culture of the area visited and can include non-consumptive adventure recreation components, or 'soft adventure' components, such as horseback riding, snorkelling or canoeing. This broader interpretation which defines ecotourism as "tourism related to nature/adventure/culture in the countryside" was applied in a major study on the North American market demand for ecotourism in British Columbia and Alberta prepared in 1994 for the governments of British Columbia, Alberta and Canada, and the Outdoor Recreation Council of British Columbia and entitled *Ecotourism – Nature/Adventure/ Culture: Alberta and British Columbia Market Demand Assessment* (HLA/ARA, 1994). It is also the interpretation that has been accepted by the Local Advisory Committee for the purposes of the Williams Lake Forest District Tourism Opportunities Study.

Until recently, ecotourism has been a niche market, but one that is among of the fastest growing segments of the tourism industry (WTO 1997; WTO, Sep/Oct 1998b). As discussed in **Section 4.1**, the WTO expects ecotourism along with cultural tourism and adventure tourism to be the hottest tourism trends for the 21st century.

One of the most important trends influencing the demand for ecotourism overall is the aging of populations in the developed world, especially in those regions where the international market demand for ecotourism is centred: North America, Northern Europe and, to a lesser extent, Japan. This change in demographics was identified in 1994 as creating more demand for ecotourism trips in British Columbia and Alberta (HLA/ARA, 1994). In the future, the demographics of an aging population are expected to have an even greater impact in terms of the demand for ecotourism experiences. For example, International Expeditions, one of the largest ecotourism companies in North America predicts that there will be a large increase in ecotourism clients by the year 2010 due the aging of the American population (Hein, 2000).

Another trend fuelling the growth of ecotourism is the growing tendency of travellers to take life-enriching vacations that involve education, the outdoors and nature (Wylie, 1997, citing Mass, 1995). The desire to learn and experience nature is influenced by at least three major factors: the changing attitude to the environment, which is based on the recognition of inter-relationships among species and ecosystems; the development of environmental education in primary and secondary schools and; the development of environmental mass media (Eagles and Higgins, 1998). The trends toward depersonalization of the workplace and high technology work and living environments are also seen as contributing to a greater demand for life enriching ecotourism experiences.

Ecotourism growth is also influenced by the increasing desire of today's urban, desk-bound society to be more physically active. In its 1997 report on adventure travel, the Travel Industry Association of America (TIA) found that about one-half of the US population said that they have participated in some form of "adventure travel", principally a wide variety of activity-based soft adventure and ecotourism activities, in the last five years alone. This trend, said the TIA, is driven by the desire of vacationers to challenge themselves and push their physical energies, as well as their desire for camaraderie among friends and quality time with family (TIA, 1998).

These trends indicate not only that there is growing demand for ecotourism, but that it is moving away from a niche market towards a mainstream one. To begin with, while ecotourism initially attracted wealthier, more educated and well-travelled people, its client base is now expanding to include a wider range of incomes, educational backgrounds and travel experience. Evidence of this market expansion is provided by a survey of North Americans which found that 77% of general consumers are interested in ecotourism (HLA/ARA, 1994). The experiences of North American ecotour operators, who indicate that their clientele is both broadening and deepening to attract inexperienced travellers (Epler Wood, 1998), provide further evidence.

A further indication of ecotourism becoming mainstream is also provided by the growing involvement of the mass market travel trade in the development and sale of ecotourism packages. Whereas ecotourism operators previously relied on niche marketing strategies - such as word of mouth and promotion through the specialty travel trade - to market their products, there is now a movement towards the sale of ecotourism by travel agents, a group generally more focussed on mass market tourism. As well, investor groups with ties to traditional mass-market tourism have recently entered the ecotourism market (Hein, 1999).

4.2.1 Ecotourism Market Size

There are no definitive statistical data on the overall size of the ecotourism market. However, various estimates and studies of the ecotourism market and of the larger nature tourism market all indicate that the market is large and growing. For example, in 1992 Filion estimated that 40-60% of all international tourists are nature tourists and 20-40% are wildlife-related tourists. More recently, in 1997 the World Tourism Organization estimated that ecotourism and all nature-related forms of tourism now account for 20% of all international travel and that ecotourism is now worth some $20 billion a year (WTO, Jan/Feb 1998).

There is also evidence on a regional basis of growing market demand. For example, in Nepal trekking tourism surged by 255% between 1980 and 1991 (Wight, citing Gurung and De Corsey, 1994). In Costa Rica, considered one of the top ecotourism destinations, visitation doubled in 1992 after the country introduced the new marketing program that helped to position it as an ecotourism destination. By 1996, more than 66% of all tourists travelling to Costa Rica reported visited a natural protected area during their (Instituto Costarricense de Turismo, 1996).

In the US, a 1991 US Travel Data Center survey found that nearly 7% of American travellers had taken at least one ecotourism trip during that year. Meantime, by 1997 a survey by the Travel Industry Association of America found that 50% of travelling Americans had taken an adventure vacation within the past five years, with 47% taking a 'soft adventure' and 3% taking a 'hard adventure' vacation (TIA, 1998). Another example of the growth in ecotourism demand in the US market is provided by a recent survey conducted by government agencies and the Sporting Goods Manufacturers Association found that 54 million Americans took part in birdwatching in 1994-95, a 155% increase over the 21 million counted in 1982-83 (Cordell, 1999).

In terms of the demand for ecotourism experiences in Canada, the recently released Environment Canada study *The Importance of Nature to Canadians* reported that 20 million Canadians 15 years of age and over spent $11 billion on nature-related activities in Canada in 1996. This included $6 billion for nature travel-related items, $3 billion for equipment and $2 billion for other items needed to pursue nature-related activities (Environment Canada, 1999).

These statistics indicate that the North American ecotourism market is very large. Unfortunately, there are no studies providing information on the size of the European ecotourism market, either as a whole or on an individual country basis.

4.2.2 Sources of Ecotourism Market Demand

Similar to the overall size of the ecotourism market, there are no reliable statistics on the location of international ecotourism demand. However, it is clear that strong market demand for ecotourism experiences does exist in a number of countries where market demand studies have been completed, namely North America (Canada and the US), the UK and Australia. Although no comprehensive market studies have yet been completed, mainland Europe is also known to be a source of ecotourism market demand.

Further evidence that these are the main source markets is provided by a recent report prepared for The Ecotourism Society (now The International Ecotourism Society). Based on anecdotal sources, the report estimates that the most prominent countries supplying ecotourists, in order of market size, are the US, the UK, Germany, Canada, France, Australia, the Netherlands, Sweden, Austria, New Zealand, Norway and Denmark. Southern European and the newly industrialized Asian countries are also generating increasing numbers of ecotourists (Eagles and Higgins, 1998).

In terms of the market for Canadian ecotourism trips, the most important markets are the domestic market, the US, the UK, France and Germany. Japan is also considered an ecotourism market (Villemarie, April, 2000). Research conducted by Tourism Canada indicates key activities of interest vary for these markets, as is shown in **Figure 4.1** below.

Figure 4.1: Principal Activities of Interest for Key Canadian Ecotourism Markets

Market	**Principal Activities of Interest**	
US	• sea kayaking (37%) • nature observation (36%) • whale watching (30%) • scuba diving (29%)	• other wildlife viewing (24%) • bird watching (19%) • canoeing (14%) • rock & ice climbing (13%) • hiking (12%)
Germans	• canoeing (31%) and trail riding • other wildlife viewing (11%)	• nature observation (6%) • scenery, national parks, forests & wildlife
French	• culture and nature	
British	• canoeing	
Japanese	• nature observation, soft adventure/ecotourism • locations "abundant in nature", with Canada's attraction being:	• natural attractions (96%) • national parks (88%) • mountainous areas (88%) • seeing wildlife (83%)
Ontario	• bird watching, sea kayaking and canoeing	• climbing, hiking and scuba diving to a lesser degree
Québécois	• scuba diving (30%)	
BC	• hiking (39%) • sea kayaking (17%)	• whale watching (15%) • nature observation (14%)

Source: Tourism Canada, 1995

4.2.3 Market Characteristics of Ecotourists

Based on an extensive literature review, the consultants have prepared detailed profiles of the ecotourism source markets most important to the Williams Lake study area, namely North America, including Canada and the US, the UK and Germany. These markets have been determined to be the most important based on current visitor activity (see **Section 5**). The market profiles are attached in **Appendix F**.

The information contained in the profiles attached in **Appendix F** and other recent studies (Wight, in press, 2000) indicates that ecotourists are not a homogeneous market segment. However, the profiles and other related research indicate that some broad generalizations can be made about the market characteristics of ecotourists.

Sociodemographics

- **Age** – Ecotourists are more likely to be baby boomers, but they also come from all other age groups.
- **Gender** - The split between male and female ecotourists is relatively even.
- **Income** – Ecotourists tend to have a higher level of income than mainstream travellers.
- **Household** – In terms of household composition, ecotourists tend to live as couples or in families.
- **Education** – Ecotourists are generally highly educated, with a high proportion being college/university graduates.
- **Occupation** – Those studies that have collected information on occupations have all found that a high percentage of ecotourists are managers or professionals.
- **Memberships** - Many ecotourists are supporters of nature-based organisations.
- **Publications** - Ecotourists tend to be consumers of outdoor and/or nature-oriented publications.

Trip Characteristics

- **Trip Length** - Trip lengths vary due to factors such as destination, activity and ecotourism experience, but overall ecotourism trips seem to be longer than non-ecotourism trips.
- **Time of Year** – Ecotourists traveling to Canadian ecotourism destinations tend to travel during the summer months, with fairly strong interest in the shoulder season and some interest in winter travel.
- **Expenditures** - Ecotourists tend to spend more than the average traveler, and spend a considerable amount on non-consumptive travel related expenses, such as equipment, dues, magazines and donations. They are prepared to spend money for quality vacations, but demand quality service.
- **Sources of Information** – Ecotourists show a high reliance on the recommendations of others (word of mouth or friends/family), and various forms of printed material are also an important source of information for ecotourists. There are also indications that personal experience from past trips plays an important role in the travel decision. In addition, the Internet is becoming increasingly important in planning ecotourism trips.

- **Trip Booking** – Many ecotourists are confident enough about traveling to make their own trip arrangements.

Motivations & Preferences

- **Travel Motivations** – Nature, including flora, fauna and geography, is the primary travel motivation of ecotourists. They not only wish to see it, but also to experience and learn about it within a natural setting. They also want to learn about history and other cultures, have new experiences, be physically active and participate in outdoor activities. Ecotourists also have a desire to be physically active and to have social contact and the opportunity to meet new people.
- **Activity Preferences** – Ecotourists enjoy a very wide variety of activities, from nature viewing and interpretation to soft and hard adventure to historically and culturally -based activities. They are looking for new, life-enriching experiences related to nature, adventure and culture. Activities common to many surveys of ecotourists include visiting national parks, wildlife viewing and cultural/aboriginal experiences.
- **Accommodation Preferences** – Ecotourists prefer intimate, adventure type accommodations, such as cabins, lodges/inns and bed and breakfasts. In terms of luxury standards, they like mid-range, followed by basic/budget level accommodations.

4.3 Tourism Activity in British Columbia

4.3.1 Tourism Visitor Volume

In 1999, BC received 22.3 million overnight travellers, representing increase of 2.1% over 1998 and an average annual increase of 1.8% since 1995. Nearly one half (47.9%) of the overnight travellers were residents of BC, 22.7% were visitors from the US and 21.7% were visitors from other parts of Canada. Asia/Pacific (8.9%) and Europe (7.8%) also provided significant number of visitors.

Figure 4.2: Total Overnight Visitors to BC (000s) – 1995 to 1999

Origin	1995	1996	1997	1998	1999	1999 Mkt Share	% Chg 98/99	Avg Ann Chg
British Columbia	10,655	10,762	10,654	10,654	10,654	47.9%	0.0%	0.0%
United States	4,602	4,045	4,342	4,779	5,059	22.7%	5.3%	2.4%
Other Canada	4,602	4,666	4,674	4,746	4,828	21.7%	1.7%	1.2%
Asia/Pacific	765	897	907	774	843	3.8%	8.9%	2.5%
Europe	560	633	616	623	671	3.0%	7.8%	4.6%
Other Overseas	94	139	163	194	203	0.9%	4.6%	21.2%
TOTAL*	**20,719**	**21,142**	**21,356**	**21,770**	**22,258**	**100.0%**	**2.1%**	**1.8%**

Source: Tourism BC, 1996-2000

** Totals may not add up due to rounding.*

For 2000, Tourism BC's forecasts indicate that BC would receive approximately 22.6 million visitors, an increase of 1.7% over 1999. Overnight visitation to the province is forecast to increase over the previous year by approximately 2.1% in each of 2001 and 2002.

No recent figures are available for the total number of day and overnight visitors to BC. The *British Columbia Visitor Study: Report on Travel in British Columbia (BC Visitor Study)* which was released in 1998 but is based on surveys conducted in 1995 and 1996, estimated that there were 30.6 million day and overnight visitors to BC in 1995/96, and that 68% (20.9 million) of these were overnight visitors.

4.3.2 Tourism Revenues

In 1999, tourism revenues in BC totalled $9.1 billion, a 2.1% increase over 1998. Increased revenues from the Asia/Pacific (11.1%), Europe (9.3%), US (6.8%) and Other Overseas (6.5%) markets contributed significantly to this growth. Increases were also seen from the Other Canada (3.2%) and BC (1.5%) markets.

Market shares for tourism revenues by source markets indicate that visitor spending is related to length of stay and per day expenditures. For example, BC residents comprised 47.9% of total visitor volumes but only 26.3% of tourism revenues.

Figure 4.3: Total Overnight Visitor Revenue ($ millions) – 1995 to 1999

Origin	1995	1996	1997	1998	1999	1999 Mkt Share	% Chg 98/99
British Columbia	2,288	2,345	2,345	2,380	2,416	26.3%	1.5%
United States	1,697	1,789	1,947	2,167	2,329	25.3%	6.8%
Other Canada	2,410	2,559	2,584	2,659	2,744	29.8%	3.2%
Asia/Pacific	718	916	952	821	911	9.9%	11.1%
Europe	518	630	610	625	683	7.4%	9.3%
Other Overseas	47	73	61	72	115	1.3%	6.5%
TOTAL*	**7,678**	**8,314**	**8,499**	**8,760**	**9,197**	**100.0%**	**2.1%**

Source: Tourism BC, 1996-2000

** Totals may not add up due to rounding.*

For 2000, Tourism BC's forecast indicated that tourism revenues would reach $9.5 billion, an increase of 3.4% over 1999. Tourism revenues are forecast to increase over the previous year by approximately 3.9% in each of 2001 and 2002.

4.3.3 Average Visitor Expenditures

Based on data collected in the 1998 *BC Visitor Study*, **Figure 4.4** provides "on average" per day expenditures of visitors from BC main source markets.

Figure 4.4: Average Expenditures of BC Source Markets

Origin	Total Over night Visitors, '95-'96	Expenditure per day, $	% of Total Overnight Visitors	% of Total Overnight Expenditures
BC Resident	*10,762,000*	*70*	*52*	*29*
Regional Canada	3,456,000	55	17	20
Long Haul Canada	1,146,000	86	5	12
Regional US	2,431,000	67	12	10
Long Haul US	1,673,000	88	8	12
Europe	508,000	76	2	6
Asia/Pacific	797,000	95	4	10

Source: Tourism BC, 1998.

In terms of European expenditures, Germans, Swiss and Austrians spent proportionately more than those from France, Netherlands and Italy. UK residents spent the same as the average for all Europeans. In terms of the Asia/Pacific market, Japanese spent proportionately less than those from Australia/New Zealand, and particularly those from other Asian countries. In terms of US expenditures, the Eastern Seaboard visitors spent proportionately more, as did those from Oregon.

4.3.4 Competitive Destinations

In terms of competitive destinations to BC overall, the regional US and Canadian markets are least likely to consider other destinations. Even with long haul US markets, fewer than half consider other destinations. **Figure 4.5** shows the greatest competitors to BC – mostly the US. Some of the shared characteristics of Canadian and US competitive destinations (Washington, Oregon, Alaska, Alberta, NWT) are that they have considerable marine and/or ecotourism opportunities.

Figure 4.5: Competitive Destinations to BC

Competing Destinations*	Regional Canada %	Long Haul Canada %	Regional US %	Long Haul US %	Europe %	Asia/ Pacific %
Considered other destinations	19	23	16	45	54	57
Of Those Who Considered Other Destinations**						
US	76 Washington 35 California 11 Oregon 11	***	84 Washington† Oregon†	84 Washington 46 Alaska 29 Oregon 21 Cal/Hawaii 18	51 Colorado 23 Alaska 15 California 14	53 California 21 Alaska 19
Other Canada	49 Alberta 42	***	33 Alberta†	41 Alberta 31	76 Alberta 54 Quebec 29 Ontario 27	70 Alberta 55 Ontario 29 NWT 14
Overseas	9	***	9	21 Europe 11 Mexico 7	25 Europe 19	27

* *Regional Canada (Alberta, Saskatchewan, Manitoba and the Territories), Regional US (Washington, Idaho, Montana, Oregon and Alaska), Long Haul Canada (other Canada), Long Haul US (other US), Europe, and Asia/Pacific.*

** *Totals exceed 100% due to multiple responses*

*** *No information*

† *No percentage given*

Source: Tourism BC, 1998.

4.3.5 Ecotourism Market Interest in BC

Due to its diverse wildlife, scenic landscapes, varied terrain and many recreational offerings, BC is a popular destination among both non-residents and residents for ecotourism experiences. In 1999, Tourism BC estimates that eco-adventure sector revenues will be in excess of $800 million (Tourism BC, 2000b).

The *Ecotourism – Nature/Adventure/ Culture: Alberta and British Columbia Market Demand Assessment* gathered information on destinations of interest by metropolitan region. It was found that ecotourism markets for Canada exist in virtually every major metropolitan area in North America. For general interest ecotourists, as shown in **Figure 4.6**, there is considerable interest in BC in major Canadian cities and in the US, particularly the Western States.

Figure 4.6: Ecotourism Market Interest in BC

Origin	% preferring BC locations
Toronto	42%
Winnipeg	34%
Seattle	30%
San Francisco	24%
Los Angeles	22%
Chicago	10%
Dallas	7%
Total	24% (201)

In addition, when asked specifically about their interest in coming to BC or Alberta for their next ecotourism vacation, between 86% and 97% of those surveyed in all cities, provided a positive response (HLA/ARA, 1994).

BC residents also show high participation in BC nature-related experiences. In 1996, an estimated 2.5 million British Columbians, or 82% of the population aged 15 years or over, participated in nature-related activities in British Columbia and elsewhere in Canada (Environment Canada, 1999).

4.4 Implications for Tourism Development in BC and the Williams Lake FD

The information contained in this section and in **Appendix F: Profiles of North American and European Ecotourists** has a number of implications for tourism development in BC and the Williams Lake study area:

- The rapid growth of the ecotourism sector in recent years and current market trends indicate that demand for ecotourism experiences, including nature, adventure and cultural tourism experiences, will be strong in the coming years.

- Canada and BC have the attributes needed to attract the ecotourist. BC has a competitive advantage in attracting ecotourists based on the combination of its natural attributes, including diverse wildlife, scenic landscapes, varied terrain and a rich cultural landscape, and the existing high level of market awareness of BC as an ecotourism destination.
- The North American and European markets are key target markets for BC and Williams Lake study area ecotourism experiences. BC and US residents are particularly important target markets because they comprise the majority of visitors to BC and have a high propensity to participate in nature experiences. Given their higher propensity to spend, their desire for travelling to off the beaten track destinations and their interest in nature and culture experiences, Germans are among the most important European target markets for BC and the Williams Lake study area. Another important European target market is the UK.
- North American and European ecotourists have common characteristics, needs and preferences that must be considered for product development. These characteristics indicate that product development in BC and the Williams Lake study area should focus on developing experiences that combine nature and culture and those providing an experiential, participatory experience. Thematic tourism products should also be developed. To meet ecotourists' preferences, new accommodation properties being developed for this market should be intimate, adventure type facilities at a mid-level luxury level standard.

5. Williams Lake Study Area Tourism Context

5.1 Previous Tourism Development Initiatives

In addition to the tourism development planning associated with the Cariboo Chilcotin Land Use Plan (see **Section 3.2.1**), previous tourism development initiatives in the Williams Lake study area have included the following:

- In 1987, the BC Ministry of Tourism, Recreation and Culture conceptualised the Gold Rush Trail, a themed scenic route extending from Hope to Barkerville and commissioned the preparation of the Strategy for Development of the Cariboo Section of the Gold Rush Trail.
- In 1988, a total of nine regional tourism plans were prepared in BC under the terms of the Canada-British Columbia Travel Industry Development Subsidiary Agreement. The Williams Lake study area was included in this process, falling within the Cariboo-Chilcotin Region Tourism Plan.
- In 1993, the Cariboo-Chilcotin Economic Futures Committee commissioned the preparation of the Chilcotin-Coast Trailblazer Study, one of three recreational trail inventories conducted as part of an overarching strategy to develop a Cariboo-Chilcotin-Coast regional trail network. The primary objective of the trail network initiative is to increase off-season winter tourism revenue to the existing bed base, restaurant and visitor service base in the region in order to help to stabilize employment in the tourism industry.
- In 1995, the Williams Lake Chamber of Commerce commissioned a Tourism Impacts Study to gain insight into the economic impacts of tourism on the City of Williams Lake.
- In 1997, the Rotary Club of Williams Lake with the assistance of six funding partners including the City of Williams Lake, BC Heritage Trust, Green Gold Grants BC/Canada, Williams Lake Indian Band, BC Forest Service and the Cariboo-Chilcotin Economic Futures commissioned the *Williams Lake River Valley Trail Study*. The study presents a preliminary Master Plan for the recreational development of the river valley lands that is intended to ensure the long term viability and enjoyment of quality community recreation benefits.
- In 1999, the CCCTA, with funding assistance from Forest Renewal BC and Human Resources Development Canada, developed the *Cariboo-Chilcotin Adventures Field Guide*. This is a series of detailed outdoor recreation maps for hiking, mountain biking, kayaking, and other activities. The guides were designed by local recreationalists for trip planning and trail navigation.
- In 1999, the Gold Rush Trail Action Alliance was formed to develop and market the Gold Rush Trail concept first developed by the Ministry of Tourism in 1987. The Alliance includes representation from the CCCTA, the Vancouver Coast & Mountains Tourism Region, the City of Williams Lake, the City of Quesnel, the District of 100 Mile House, the District of Wells and Likely, the Cariboo Regional District, CEAF, and the Barkerville Historic Town/MSBTC and Culture BC. The Alliance first commissioned the preparation of the Tourism Product Inventory & Marketing Plan for the Cariboo Gold Rush Trail Action Alliance. This study inventoried the existing tourism businesses along the Trail and with the Trail towns, outlined a short term marketing plan, and provided 24 recommendations for developing the Gold Rush Trail.

Following the preparation of this study, the Gold Rush Trail Development Cooperative (GRTDC) was formed. The GRTDC is undertaking a variety of initiatives to market the Gold Rush Trail, including the development of a newsletter, a digital photo bank, a direct mail program, the preparation of brochures, and an advertising program.

5.2 Tourism Resources

As mentioned previously, as a first step in the TOS process the Ministry of Small Business, Tourism and Culture, Tourism Policy and Land Use Branch, commissioned the updating of existing tourism resource and recreation databases for the Williams Lake study area. Based on the tourism operators' database, the following tables provide a summary of the tourism facilities and services existing in the study area and the types of activities being offered by operators. The more detailed inventory of the available tourism resources, as attached in **Appendix G**, shows that the majority of both accommodation properties and a large proportion of the tourism facilities/services are located in Williams Lake. A proposal to construct a convention centre and hotel, including a casino, on the R.C. Cotton site at the west end of Williams Lake has also been put forth.

Figure 5.1: Accommodation Properties by Type

Type	Number of Properties*	Number of Units/Sites
Hotel	4	294 units
Motel	8	243 units
Lodge/Resort**	5	29 units
Guest House/Farm***	2	20 units
Bed & Breakfast	2	7 units
Cabins/Cottages	2	7 units
Camps****	5	3 units
Subtotal Units	***30***	***603 units***
RV/Campground	13	334 sites
Total Units and Sites	**41**	**603 units / 334 sites**

* *There are only 37 individual accommodation properties in the Williams Lake study area, however several of them have more than one type of accommodation available (e.g., motel and RV campground)*

** *3 Lodge/Resorts did not report their Number of Units; one of these, Tyee Lake Lodge, is currently not in operation*

*** *1 Guest House/Farms did not report their Number of Units*

**** *4 Camps did not report their Number of Units*

Figure 5.2: Tourism Facilities / Services

Attractions	
Arts/Culture/Heritage	1
Art Galleries	2
Museums	3
Nature	1
Festivals/Events	
Festivals/Events	13
Recreation Facilities	
Recreation	2
Golf	2
Mini-Golf	2
Services	
Food and Beverage	17
Land Tours/Charters	13
Air Charters/Tours	4
Guide Outfitters	10
Fishing Charters	2
Recreation Equipment Rentals	2
Car Rental	2

Figure 5.3: Activities Offered by Tourism Operators

Activity Type	# of Operators
Water Sport Activities	
Beach activities	1
Boating (motorized)	2
Boating (non-motorized)	3
Canoeing	2
Jet Boating	1
Kayaking (river)	1
Rafting	4
Swimming/bathing	3
Water sports, general	1
Snow Sport Activities	
Cross-country skiing	4
Heli-skiing	1
Ice Climbing	1
Snowmobiling	1
Fishing Activities	
Fishing, general	11
Sport fishing (freshwater)	3
Hunting Activities	
Hunting, general	14
Summer Land Sport Activities	
All-Terrain Vehicle	1
Bird Watching	2
Golf	2
Heli-hiking	1
Hiking/Backpacking	7
Horseback Riding	7
Llama Trekking	1
Mini-golf	2
Motorized Land Activities, general	1
Mountain biking	3
Nature Activities, general	4
Rock Climbing	1
Viewing, general	1
Wildlife Viewing	9
Other	
Camping, general	4
Cultural/Historical	1
Float plane Flightseeing Fixed-Wing	2

5.3 Tourism Activity

This section provides information on visitor activity and the profiles of visitors to the Cariboo-Chilcotin-Coast tourism region and the Williams Lake study area. The *BC Visitor Study* series is the best source of information for regional tourism activity. This study was released in 1998 but is based on surveys conducted in 1995 and 1996. Given that the tourism data is not only quite dated but relates to the entire Cariboo-Chilcotin-Coast region, a large geographical area, it cannot be considered to accurately reflect tourism activity in the Williams Lake study area. The data for the Williams Lake InfoCentre, which provides information on local tourism activity, is even less reliable since the statistics collected apply only to those visitors who visited the InfoCentre. Despite these limitations, the data presented below do provide information useful for the purposes of this study.

5.3.1 Tourism in the Cariboo-Chilcotin-Coast Tourism Region

The primary focus of the *BC Visitor Study* was to profile the overnight visitor to BC. Consequently, with the exception of overall visitor numbers, tourism revenues and average length of stay, the information provided on visitors to the Cariboo-Chilcotin-Coast tourism region pertains to the characteristics of visitors who were on an overnight trip to BC and visited the Cariboo-Chilcotin-Coast region while on their trip. These visitors may have travelled to the Cariboo-Chilcotin-Coast region for either a day or overnight trip.

Visitor Volume and Value

The *BC Visitor Study* reported that over 1.7 million visitors travelled to the Cariboo-Chilcotin-Coast region for a day or overnight trip in 1995/96, representing 6% of all BC visitors. It was estimated that 60% (1.04 million) of the Cariboo-Chilcotin-Coast region visitors were BC residents and 40% (684,000) were non-residents of BC. The study did not provide a breakdown of the number of day visitors to overnight visitors for the Cariboo-Chilcotin-Coast region. However, assuming that the breakdown for this region is similar to the breakdown for entire province (68% were overnight visitors as per **Section 4.3.1**), it is estimated that 707,000 of the BC residents and 465,000 of the non-residents who visited the Cariboo-Chilcotin-Coast region in 1995/96 were overnight visitors.

The total tourism revenue for the Cariboo-Chilcotin-Coast region was estimated at $198 million in 1995/96, about 2% of all BC tourism revenue. Non-residents generated 33% ($65 million) while residents generated 67% ($133 million) of the region's tourism revenue.

Visitor Origins

The Greater Vancouver Regional District (GVRD) accounted for 37% of the BC resident visitors to the Cariboo-Chilcotin-Coast region in 1995/96, followed by South BC (33%), North BC (19%) and Vancouver Island (11%). (South BC refers to Vancouver Coast and Mountains, excluding the GVRD, South & North Thompson-Okanagan, West BC Rockies, Cariboo and East BC Rockies. North BC refers to the remaining northern regions.)

About one third (31%) of non-resident visitors to the Cariboo-Chilcotin-Coast region came from Regional Canada (Alberta, Saskatchewan, Manitoba and the Territories). The Regional US market (Washington, Idaho, Montana, Oregon and Alaska) was second in importance at 28%, followed by Long Haul US (other US) at 15%, Europe at 14%, Long Haul Canada (other Canada) at 6% and Asia/Pacific at 3%.

Sociodemographics

About 54% of the BC resident visitors and 53% of non-resident visitors who took an overnight trip in BC and visited the Cariboo-Chilcotin-Coast region were female. The following table provides additional information on the sociodemographics of visitors. In the case of resident visitors, it shows that the average age is 44 years, more than one half (55%) have at least some post-secondary education, and the majority (63%) are from middle and upper income brackets. For non-resident visitors, the average age is 46, more than three quarters (77%) have post-secondary education, and 74% are from middle and upper income brackets.

Characteristic	Resident Visitors(%)	Non-resident Visitors(%)
Age (years)		
18-34	30	22
35-54	46	46
55+	24	42
Mean Age	44	46
Education		
At least some post- secondary	55	77
High school or less	45	13
Household Income ($CDN)		
< $40,000	38	26
$40,000 to $80,000	49	46
> $80,000	14	28

Trip Characteristics

Relevant trip characteristics for BC resident visitors to the Cariboo-Chilcotin-Coast region are summarized below.

Average Length of Stay – Resident visitors spent an average of 3.6 days in the region, while non-resident visitors stayed 2.6 days.

Seasonality – The majority of BC residents travelling in the Cariboo-Chilcotin-Coast favour summer travel, but about one in five travel in the winter. Summer travel is even more popular among non-resident visitors.

Season of Travel	Resident Visitors(%)	Non-resident Visitors(%)
Spring (April and May)	14	12
Summer (June to September)	58	71
Fall (October and November)	9	8
Winter (December to March)	18	9

Travel Party – Resident visitors of all types (overall, leisure and business) travelled in the region in groups of 3.2 people. Non-resident overall and leisure visitors travel in groups of 2.3, while business travel parties average 1.9 people.

Average Party Size	Resident Visitors(%)	Non-resident Visitors(%)
Overall	3.2	2.3
Leisure Visitor	3.2	2.3
Business Visitor	3.2	1.9

Most (70%) of resident travel parties did not contain children. Couples were the most popular party composition among residents, comprising more than 56% of travel parties. In the case of non-residents, the great majority (81%) of travel parties were comprised solely of adults, with couples also being the most common party composition at 50%.

Party Composition	Resident Visitors(%)	Non-resident Visitors(%)
Alone	14	31
Two+ adults/no children	56	50
One+ adult with children	6	3
Two+ adults with children	23	16

Trip Purpose – Most resident visitors (89%) as well as non-resident visitors (87%) to the Cariboo-Chilcotin-Coast region travelled for leisure purposes. Visiting friends/relatives (41%) was the most common trip purpose for residents, followed by participating in outdoor/wilderness activities (29%). General sightseeing (34%) was the most popular trip purpose for non-residents, followed by visiting friends and relatives (31%) and participating in outdoor/wilderness activities (23%).

Trip Purpose	Resident Visitors(%)	Non-resident Visitors(%)
Leisure Visitors	**89**	**87**
Visiting friends/relatives	41	31
Outdoors/wilderness activities	29	23
Sports events	7	1
City/town sightseeing	-	8
General sightseeing	4	34
Shopping	4	*
Other	9	3
Business Visitors	**11**	**13**

** less than 1%*

- not asked/answered

Expenditures – Resident visitors spend an average of $40 per day and $128 per stay in the Cariboo-Chilcotin-Coast region, while non-residents spend $36 per day and $95 per stay. Food and beverage purchases accounted for nearly one third (32%) of residents' expenditures, followed by accommodation (18%) and transportation (18%). Food and beverage purchases are also the top expenditure item for non-resident visitors at 34%, followed by transportation (31%) and accommodation (18%).

Expenditures	Resident Visitors(%)	Non-resident Visitors(%)
Food and Beverage	32	34
Accommodation	18	18
Transportation	18	31
Souvenirs/gifts	3	3
Outdoor activities	5	4
Attractions and cultural events	4	3
Other	20	8

Activities – The following table provides information on the activities resident visitors to the Cariboo-Chilcotin-Coast participated in while on an overnight trip in the province. The sample size in the *BC Visitor Study* was insufficient to allow reporting on the activities of non-resident visitors.

Land-based activities are very popular among resident visitors, particularly wildlife viewing/bird watching, as are sightseeing and photography. Many residents also visit attractions, primarily historic sites.

Activities in the Province†	Resident Visitors(%)
Outdoor Activities	
Land-based activities (net)	56
Wildlife viewing/bird watching	40
Hiking/backpacking	28
Visiting national/provincial park	26
Bicycling	10
Fishing	24
Boating	24
Sightseeing	52
Photography	48
Golfing	4
Attractions/Culture/Events	
Events (net)	11
Local festivals/fairs/events	11
Attractions (net)	34
Historic sites	22
Art galleries/museums	13
Zoos/natural displays/gardens	12
Native (Indian) cultural sites	12
Wineries/farm tours	4

† *Multiple responses allowed*

Sources of Information – The sample size in the *BC Visitor Study* was insufficient to allow reporting on the sources of information used by non-resident visitors.

In the case of BC residents, most visitors (55%) did not use any information sources either before or during their trip in BC. For those who did, the most popular sources of information were the recommendations of friends, relatives and others, followed by brochures/books.

Sources of Information†	Resident Visitors(%)
Friends, relatives, clubs, associates	14
Travel agents, airlines, auto associations	-
Brochures/books	11
Tourism BC 1-800 numbers	8
Travel information centres	7
Media coverage	1
Advertising (print/TV)	1
Tour operators/tourism-specific businesses	*
BC tourism association	3
No sources used	55

† *Multiple responses allowed; reflects sources of information used both prior to and during trip.*

* *Less than 1%.*

5.4 Tourism in the Williams Lake Study Area

Tourism BC Visitor Study

The *BC Visitor Study* provides some data on visitation to the Central Cariboo region, within which the Williams Lake study area falls. It found that of the total BC residents who took an overnight trip in BC and visited the Cariboo-Chilcotin-Coast region in 1995/96, 26% visited the Central Cariboo. About 35% of non residents who visited the Cariboo-Chilcotin-Coast region in 1995/96 visited the Central Cariboo region.

As per **Section 5.3.1,** it is assumed that the breakdown between overnight and day visitors for the Cariboo-Chilcotin-Coast region is similar to the breakdown for entire province (68% were overnight visitors). Based on this assumption, it was estimated that 707,000 of the BC residents and 465,000 of the non-residents who visited the Cariboo-Chilcotin-Coast in 1995/96 were overnight visitors. Taking this assumption a step further, and using the above data on visitation to the Central Cariboo, the indication is that a total of about 350,000 of the resident and non-resident visitors who visited Cariboo-Chilcotin-Coast region in 1995/96 may have visited the Central Cariboo region.

Figure 5.4: Estimate of Overnight Resident and Non-resident Visitors to Central Cariboo Region

BC Resident Visitors	
- Estimated resident visitors to the Cariboo-Chilcotin-Coast region	707,000
- Total resident visitors visiting the Central Cariboo region	26%
Subtotal – Resident Visitors	*184,000*
Non-resident Visitors	
- Estimated non-resident visitors to the Cariboo-Chilcotin-Coast region	465,000
- Total non-resident visitors visiting the Central Cariboo region	35%
Subtotal – Non-Resident Visitors	*163,000*
Total Resident and Non-Resident Visitors	**347,000**

Sources: BC Tourism, 1998
ARA/KPMG estimates

Williams Lake InfoCentre Visitors

Data collected at Tourism BC InfoCentre at Williams Lake provides insight into Williams Lake region visitors. These statistics are of limited usefulness as they capture only those visitors who stopped at the InfoCentre during their trip in the region. Moreover, the statistics are limited to the InfoCentre's operating hours, and capture only those visitors who took the time to register and answer the questions on visitor characteristics.

The data does nonetheless provide indictors of tourism activity in the region, and the data from 1998, 1999 and 2000 are presented in **Appendix H**. The statistics collection system was changed significantly in 2000 making it difficult to comment on some tourism trends in 2000. However, some comments can be made on tourism in the area based the InfoCentre's data:

Visitation levels – Visitation to the InfoCentre has declined quite significantly, both for the number of parties (17% decline) and the number of visitors (17% decline), between 1998 and 2000, indicating that overall visitation to the area may have declined.

Tour Bus Activity – Tour bus activity in the region appears to be quite minimal, however the numbers may be misleading given that the InfoCentre parking lot does not accommodate tour busses. The increased number of tour bus registrations at the InfoCentre in 2000 compared to 1998 indicates that tour bus activity may be increasing.

Origin – For all three years, most visitors to the region were from British Columbia. The regional, North America and Europe markets are also significant sources of visitors.

Destination – Most visitors to the InfoCentre in 1998 and 1999 were either on a multi-destination trip in BC or visiting the Williams Lake community or local tourism region.

Average Length of Stay – The majority of visitors who visited the InfoCentre in 1998 and 1999 were either staying for just one day. However, a significant percentage of visitors were visiting for either one to three nights or for more than 15 nights. In 2000, the percentage of visitors staying for just one day increased significantly as did the percentage staying one to three nights. Compared to 1998 and 1999, few of those who visited stayed in the area for two or more weeks.

Main Purpose of Trip – In 1998 and 1999, the majority of visitors who registered at the InfoCentre were on pleasure trips, with sightseeing and visiting friends and relatives being the most common main trip purposes.

5.5 Regional Tourism SWOT Assessment

To obtain insight into the tourism capabilities of the Williams Lake study area, an analysis of the strengths, weaknesses, opportunities, threats and issues of the region from a tourism perspective was undertaken. The "SWOT analysis" was prepared based on a workshop with the Local Advisory Committee for the TOS project and interviews with community representatives and representatives of local government departments, other public and non-profit organizations and the tourism industry (see **Appendix B**). The key findings of the SWOT analysis are presented below.

Figure 5.5: SWOT Analysis for the Williams Lake Study Area

STRENGTHS

- Climate – moderate temperatures; four distinct seasons plus break up
- Natural resources - scenic beauty; diverse, quality physiographic, biogeoclimatic and wildlife resources; pristine rivers, lakes and wilderness; accessible terrain; unique features/ attractions (e.g., Chilcotin River, Fraser River Grasslands, Farwell Canyon, Scout Island)
- Protected areas – Junction Sheep Range Park, Big Creek Park and Churn Creek Protect Area are "dormant jewels"
- Transportation modes - multiple transportation modes available into region (automobile, motorcoach, air, rail)
- Cultural tourism – diverse, unique Gold Rush Trail, Western theme, Aboriginal theme products and opportunities; GRTDC awareness and marketing initiatives
- Fishing – excellent fresh water fishing opportunities
- Four seasons tourism and recreation - diversity of quality summer and winter ecotourism, adventure tourism, outdoor recreation products and opportunities
- Trails – good system of biking/ hiking/ horseback riding/ walking trails
- Land use planning – fosters collaboration and cooperation among multiple resource users; provides recognition of need to protect tourism and recreation values
- Positioning – positioned to take advantage of growing market demand for experiential/ interpretive outdoor tourism product
- Regional centre – rising importance of Williams Lake as regional private and public tourism service centre and gateway to tourism and recreation opportunities
- GVRD market – proximity to large market; potential for mini vacations
- Volunteers – significant contribution to development of tourism and recreation infrastructure and events coordination

WEAKNESSES

- Accommodation – only destination lodge in area is not currently operating; lack of tenting and RV facilities near Williams Lake
- Communication – lack of bandwidth, 911 service, cell phone service
- Conference facilities – lack of conference centre limits convention/ tourism potential
- Economic dependency – regional economy heavily dependent on resource extraction industries
- InfoCentre location – lack of visibility; inconvenient access; insufficient parking; lack of bus parking
- Market awareness – lack of awareness of destination and offerings
- Seasonality/ weather – most tourism product is season and weather dependent
- Signage – lack of directional and interpretive signage
- Social issues – highest illiteracy rate in BC
- Transportation – seasonal weather related (fog) flight cancellations
- Urban tourism – image of Williams Lake as forestry centre; lack of tourism attractions/ activities/ amenities/ services

OPPORTUNITIES

- Ecotourism/ Adventure tourism – develop/ grow unique ecotourism/ adventure tourism/ recreation products
- Heritage/ cultural tourism – develop/ grow unique western theme/ Aboriginal theme/ Gold Rush Trail theme products
- Inter-industry partnerships – partner with mining/ logging industries to develop industrial tourism products; cooperate with logging industry to maintain/ improve access to tourism resources
- River-based tourism and recreation – develop unique water-based eco-cultural products on Chilcotin River and Fraser River corridors
- Planned developments – new hotel and convention centre being pursued
- Packaging – develop sightseeing, ecotourism, adventure tourism, outdoor recreation and cultural tourism tours and packages for bus tour, drive-by, FIT, group tour and BC Rail markets
- Events – grow existing events (e.g., Stampede; Bull Mountain Challenge); develop new events (e.g., whitewater rafting competition, mountain biking competitions)
- Entrepreneurial opportunities – including equipment rentals, interpretation/ guiding
- Marketing – cooperative marketing/ promotion of unique natural attributes and tourism and recreation products; develop signage to promote area themes
- Discovery Coast Passage – increasing awareness of ferry route connecting Vancouver Island and Central BC
- Gateway – develop Williams Lake as "gateway" to tourism and recreation experiences
- GVRD market – marketing of easily accessible/ affordable ecotourism, outdoor recreation and cultural tourism experiences; marketing of mini vacations
- Tourism spin-offs – development of outdoor recreation-related manufacturing (e.g., fly fishing equipment, mountain bike frames suited to unique BC conditions)

THREATS

- Air Access – high operating costs jeopardize continued operation of regional airports; air access issues in Western Canada threaten European market (e.g., frequency of service, routing of flights, airfare costs)
- Fuel – high cost of fuel threatens strength of BC and regional touring markets
- Government cutbacks - insufficient resources to develop/ maintain programs, trails, tourism amenities and infrastructure
- Intercultural concerns - uncertainty of First Nations land claims process; lack of inter-cultural understanding and cooperation
- Resource development impacts - industrial development impacting tourism and recreation values; damage from users and motorized vehicles (ATVs, snowmobiles)
- Resource quality issues – air and water quality concerns
- Transportation – planned reduction of BC Rail passenger service in 2001 and cancellation of Cariboo Prospector service in 2002; planned reduction of BC Ferries mid-coast ferry service in 2001

ISSUES

- Access – high cost of airfares; on-going fight to maintain BC Rail service and BC Ferry service to the mid-coast; decommissioning of logging roads limits backcountry access
- Animal welfare – Actions by animal welfare groups (re Stampede, rodeos, etc.)
- Awareness/ community support – lack of awareness of tourism opportunities and interest in tourism development and marketing
- Financing – lack of funding/ financing for tourism development
- Land use concerns – inter-industry conflicts over resource use/ access
- Land use planning/ management – minimal involvement of MSBTC in resource planning and policy; multiple agency involvement in natural resource management creates gaps/ ambiguities; ambiguities over management of tourism and recreation values; failure to fully implement Land Use Plan Tourism Strategy
- Marketing – insufficient/ ineffective marketing of destination and tourism offerings
- Permitting – multiple agency involvement in permitting; conflicting/ inconsistent/ changing regulations/ policies; slowness of processes; negative impact of some policies on tourism development (e.g., no transference of rod days when business sold)
- Seasonality – affects financial viability of tourism businesses
- Tourism resource issues - conflicts regarding appropriate locations for tourism; conflicts between tourism activities (e.g., snowmobiling and wildlife viewing); conflicts between commercial tourism use and independent recreation
- Skills and Training – need for business and marketing skills development, and tourism and hospitality training programs
- Visitor infrastructure/ services – need for improved InfoCentre, visitor amenities and tourism infrastructure, signage and services
- Visitor management – limiting visitors as appropriate for land capacity

5.6 Implications for Tourism Development in the Williams Lake Study Area

The information contained in this section and the associated appendices (**Appendix G: Tourism Resources in the Williams Lake Study Area** and **Appendix H: Williams Lake InfoCentre Statistics**) has the following implications for tourism development in the Williams Lake study area:

- There is a wide array of quality natural and cultural resources in the study area that can be capitalized upon for developing the ecotourism sector. These include the diverse physical environment and numerous natural attractions and activities, the interesting Gold Rush history, and the historic and living western and First Nations cultures. The study area's cultural resources and freshwater fishing resources are underutilized in terms of tourism development but hold much potential for future development.
- The supply of visitor accommodation in the region is limited in size and type. Most of the accommodation is concentrated in Williams Lake and the only destination lodge which meets the accommodation preferences of the ecotourist, the Tyee Lodge, has been closed for several years. This implies that the development of a destination lodge may be key to the development of the study area's ecotourism sector.
- The level of competition in the study area's ecotourism sector is relatively low to moderate at this time, indicating that there are opportunities for new product development. This is particularly true in the case of western theme tourism and First Nations cultural tourism experiences.
- BC residents comprise well over half of the visitor market to the region and therefore will be an important market for ecotourism experiences. The GVRD market and South BC markets are particularly important resident markets, and hold potential for the development of mini-holiday packages. The regional and European markets are also important target markets for the study area.
- The increase in tour busses registering at the Williams Lake InfoCentre implies that the area is becoming more popular among this segment of the market, and indicates that the study area should place more emphasis on developing tourism offerings that would appeal to this segment. There are also opportunities for the development of ecotourism packages that meet the needs of the rail and air passenger markets.
- The many opportunities for ecotourism package development implies that operators will require assistance in product development and packaging as well as ecotourism marketing and awareness.

6. Strategic Framework For Ecotourism Development

Converting the short listed ecotourism products and activities for the Williams Lake study area from opportunities to actualities will have a stronger likelihood of success if they are integral to an overall strategic framework for ecotourism development in the study area. While beyond the requested scope of services, the strategic framework presented below for this study area consists of a definition for ecotourism assumed for the purposes of this study, a vision for ecotourism, objectives of ecotourism development, ecotourism positioning and themes around which the opportunities should be centred and broad strategic directions which should guide the ecotourism action plan.

Figure 6.1 highlights the interrelationships between the definition, vision, objectives, positioning, themes and strategic directions for ecotourism development in the Williams Lake study area. The ecotourism action plan developed in **Section 8** then provides an indication of the major actions required not only to introduce each of the short-listed ecotourism products and activities but also to provide the necessary broader base of support that they require as part of an overall strategic framework.

6.1 Definition of Ecotourism

The definition of ecotourism that has been assumed for the Williams Lake study area by the Local Advisory Committee and the consultants is broad in scope in that it extends beyond nature to also encompass adventure tourism and culture and heritage. Therefore, opportunities for ecotourism facilities, activities and services may also focus on "community" – involvement of local communities as well as interaction with them and interpretation of their heritage and culture. The definition also includes recreation of both a commercial and non-commercial nature. However, general mass-market tourism is seen as falling outside of this definition.

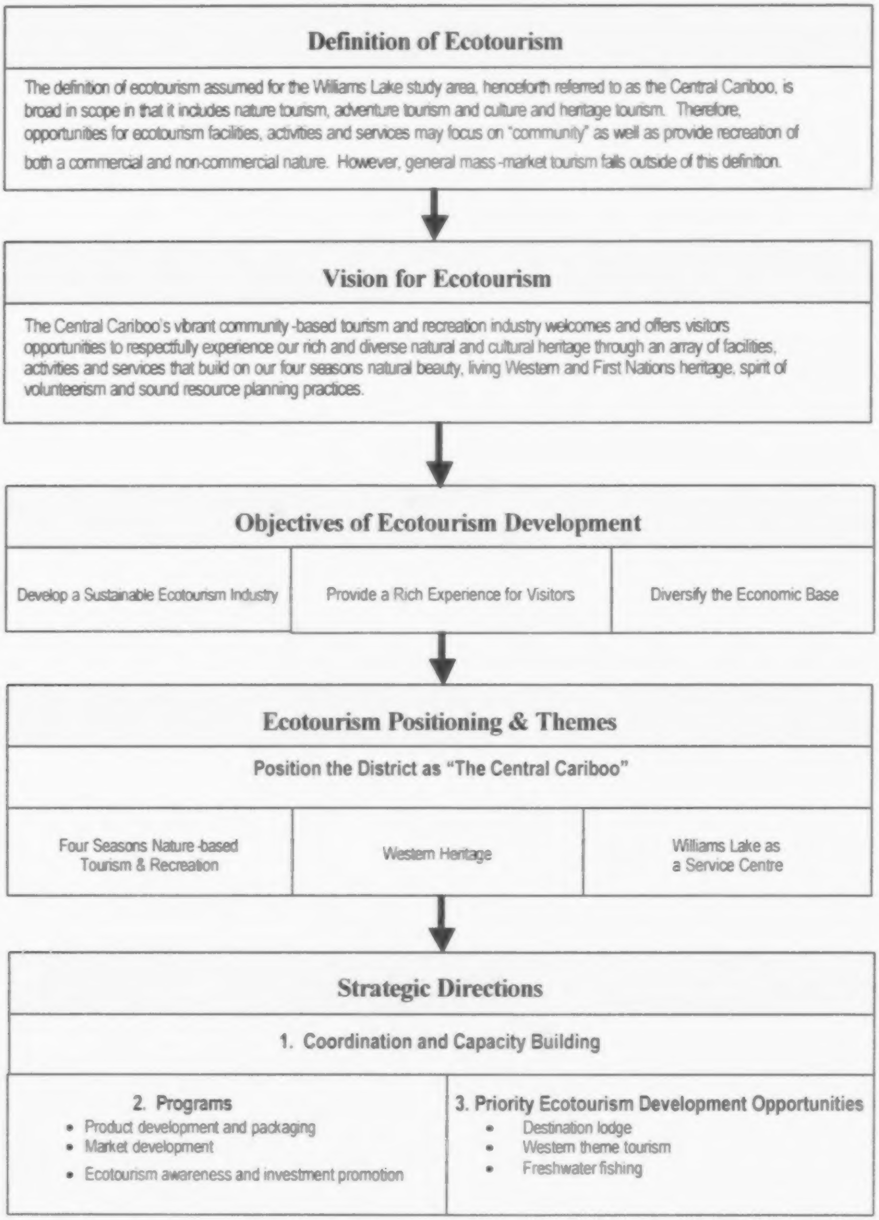
6.2 Vision for Ecotourism

The vision statement proposed for ecotourism development in the Williams Lake study area is:

> *The Central Cariboo's vibrant community-based tourism and recreation industry welcomes and offers visitors opportunities to respectfully experience our rich and diverse natural and cultural heritage through an array of facilities, activities and services that build on our four seasons natural beauty, living Western and First Nations heritage, spirit of volunteerism and sound resource planning practices.*

The Williams Lake study area is referred to in the vision statement and henceforth in this report as "The Central Cariboo". The rationale for this is presented in **Section 6.4**.

Figure 6.1: Strategic Framework for Ecotourism Development in Williams Lake Study Area



Definition of Ecotourism

The definition of ecotourism assumed for the Williams Lake study area, henceforth referred to as the Central Cariboo, is broad in scope in that it includes nature tourism, adventure tourism and culture and heritage tourism. Therefore, opportunities for ecotourism facilities, activities and services may focus on "community" as well as provide recreation of both a commercial and non-commercial nature. However, general mass-market tourism falls outside of this definition.

Vision for Ecotourism

The Central Cariboo's vibrant community-based tourism and recreation industry welcomes and offers visitors opportunities to respectfully experience our rich and diverse natural and cultural heritage through an array of facilities, activities and services that build on our four seasons natural beauty, living Western and First Nations heritage, spirit of volunteerism and sound resource planning practices.

Objectives of Ecotourism Development

- Develop a Sustainable Ecotourism Industry
- Provide a Rich Experience for Visitors
- Diversify the Economic Base

Ecotourism Positioning & Themes

Position the District as "The Central Cariboo"

- Four Seasons Nature-based Tourism & Recreation
- Western Heritage
- Williams Lake as a Service Centre

Strategic Directions

1. Coordination and Capacity Building

2. Programs

- Product development and packaging
- Market development
- Ecotourism awareness and investment promotion

3. Priority Ecotourism Development Opportunities

- Destination lodge
- Western theme tourism
- Freshwater fishing

6.3 Objectives for Ecotourism Development

The primary objectives for ecotourism development in the Central Cariboo are:

- **Develop a sustainable ecotourism industry** – one that is achievable, sustainable in environmental, economic and social terms, compatible with land use plans and practices and both respectful of and beneficial to the communities and businesses located within the Study area;
- **Provide a rich experience for visitors** – an enriching, quality and memorable experience that builds on the area's intrinsic qualities and at the same time reflects existing and emerging market preferences; and
- **Diversify the economic base** – to one that encompasses not only traditional industries but also fast growing industries such as tourism, thereby creating jobs, building partnerships, fostering community pride and improving the quality of life among residents of the study area.

6.4 Ecotourism Positioning and Themes

As observed in the vision statement, to better position the Williams Lake study area within the ecotourism marketplace, the Local Advisory Committee and the consultants have chosen to refer to the Williams Lake study area as "the Central Cariboo". This should assist in improving awareness and recognition of the area as an ecotourism destination – for both its physical and cultural dimensions.

Furthermore, the ecotourism facilities, services and activities offered in the study area should be positioned and priced so that they are attractive and affordable to the "middle market" of ecotourists, rather than exclusively or predominately to the "high end" of the ecotourism market. This is in keeping with the area's broad appeal and the market segments with greatest potential.

The three ecotourism themes proposed to support this market positioning are considered intrinsic to and natural directions for the Central Cariboo. The short-listed ecotourism opportunities fall within one or more of these themes. They are:

- **Four seasons nature-based tourism and recreation** – Much of the study area's geology, flora and fauna is attractive, diverse, largely accessible and of four-season appeal. Collectively, it lends itself to a variety of warm and cold weather ecotourism and recreational pursuits, many of which are already practiced by individuals and groups on their own and with guides. But opportunities remain to expand and improve upon current offerings, improve care and minimize user conflicts;
- **Western heritage** – The Western "cowboy" culture is very much alive in the Williams Lake area – and is undeniably more intrinsic and entrenched here than in other parts of the province. This can be evidenced by the large and successful ranches operating here, the rodeos and stampedes held annually here and the clothing worn by many of the area residents. This culture is of great interest particularly to urban dwelling North American and European tourists – with stays at dude ranches and horseback riding trips enjoying great popularity. However, opportunities for visitors to witness and experience this lifestyle are currently limited in the study area; and

- **Service Centre** – The City of Williams Lake – given its central location, size and retail base – lends itself to serving as a service centre for ecotourism activity occurring in the Cariboo - Chilcotin. It is a prime location from which to offer information and guiding services, provisions and supplies, repair and other services required by ecotourism operators and visitors not only to the Williams Lake study area but also to neighbouring areas. Niche industries such as manufacturing of mountain bikes and flyfishing equipment can also be developed here. Maintaining inter-regional transportation services here is crucial to tourism's long-term sustainability in the Central Cariboo.

In addition to these three themes, as with the Western heritage, the First Nations heritage is also an intrinsic and living part the area and there is great interest among ecotourists to learn more about Aboriginal cultures and traditions. Limited opportunities do already exist in the study area for visitors, but it is recommended that the tourism industry works closely with the communities to develop additional Aboriginal tourism products.

6.5 Strategic Directions

The three key strategic directions recommended below serve to develop the foundation required to achieve the vision, meet the objectives, position the area and develop the themes and short-listed opportunities for ecotourism in the Central Cariboo:

- **Coordination and capacity building**:
  - Create an ecotourism sector task force comprising industry and government representatives in order to generate support and develop ongoing mechanisms for the coordination of ecotourism initiatives and activities within the Central Cariboo; and
  - Provide institutional and technical support to strengthen the capacity of institutions, businesses and individuals to develop, deliver and support ecotourism in the Central Cariboo on a sustainable basis by identifying resources for capacity building, developing a web site and undertaking training programs.
- **Programs** – including:
  - Product development and packaging approaches such as packaging seminars/workshops, best practices examples, hospitality programs, and cooperative stewardship.
  - Market development initiatives such as market information packages, market development workshops, travel trade workshops, and re-alignment of regional marketing with BC marketing; and
  - Ecotourism awareness and investment promotions initiatives such as publication of opportunity assessments and business/resource product planning workshops.
- **Priority ecotourism development opportunities** – focus on developing the ecotourism product opportunities seen as most critical to establishing the Central Cariboo as an ecotourism destination. Initiatives include:
  - Refine market-driven product definitions for priorities;
  - Interpretive workshop planning; and
  - Marketing strategies.

The action plan presented in **Section 8** includes actions that should be undertaken to pursue these strategic directions and thereby develop the needed base of support to convert the shortlisted opportunities into ecotourism offerings in the Central Cariboo.

7. Assessment of Tourism Opportunities

Through interviews with community stakeholders and the consultants' knowledge, 26 ecotourism products and activities with potential for development were identified for the Central Cariboo. These products/activities were grouped into four thematic areas:

- Ecotourism/Adventure Tourism – further grouped into sub-categories of Summer Land-based, Winter Land-based and Water-based
- Aboriginal Tourism
- Western and Gold Rush Heritage/Cultural Tourism
- Industrial Tourism

The consultants then reviewed the approaches used for evaluating potential tourism opportunities in previous Tourism Opportunities Strategies prepared for MSBTC. Using aspects of the evaluation approaches used in previous studies and other evaluation factors, including an assessment by the travel trade, the consultants devised approaches both for selecting the short list of opportunities which would undergo more detailed assessment and for conducting the more detailed assessments of the short listed tourism opportunities.

7.1 Selection of Tourism Products/Activities

A three step process was used for the selection of the short list of tourism products/activities for more detailed assessment. First, the products/activities were evaluated on a preliminary basis by the consultants. Second, they were evaluated by representatives of selected tour companies. Third, the Local Advisory Committee, assisted by the consultants, selected the products/activities that would undergo more detailed assessment.

Tourism Opportunities Preliminary Assessment

The 26 products/activities were assessed on a preliminary basis based on the consultants' knowledge of the available resources in the Central Cariboo, the markets associated with each of the tourism products/activities, the economic potential of the tourism products/activities, and social and community factors in the study area. Four categories of criteria were used, with each of the products/activities being scored against each of these criteria on a four point ranking scale where 1 = Poor, 2 = Average, 3 = Good and 4 = Excellent.

Attached in **Appendix I1** is a summary of the criteria applied and the matrix completed by the consultants, which presents the preliminary assessment of all 26 identified potential tourism products/activities. The matrix shows that the following 16 tourism products/activities received a total score of 33 points or greater, indicating that they had the best short term development potential and therefore should be considered for more detailed assessment:

- Trail Network
- Destination Lodge
- Hiking
- Nature Observation
- Xats'ull Heritage Village
- Mountain biking
- Working Ranch Experiences
- Campground

- Freshwater Fishing
- Aboriginal Tourism
- Western Theme Interpretive Programs
- Horseback Trail Riding
- Riverboat Tours
- Scenic Driving Tours
- Gold Rush Interpretive Programs
- Snowmobiling

One of these sixteen products, Gold Rush Theme Interpretive Programs, was however eliminated as being one of the products that would be considered for more detailed assessment because a separate initiative is already pursuing development and marketing of this product.

Travel Trade Assessment

Following the consultants preliminary assessment, the following six tour companies were contacted to provide input from a market perspective on the short term development potential of the fifteen remaining tourism products / activities (after the elimination of Gold Rush Theme Interpretive Programs).

Name of Company	Contact Name	Telephone	Fax	Email
BC Rail	Rob Hart Marketing Co-ordinator	(604) 984-5246	(604) 984-5505	pass_info@bcrail.com
Benno's Adventure Tours	Benno Jaeger Owner	(604) 738-5105	(604) 738-9100	bennosadventure@home.com
Greyhound Travel Services	Dan Koller Manager, Travel Development	(604) 661-0377	(604) 683-0144	dkoller@pacificcoast.net
Jonview Tours	Candy Bannon Manager, Special Projects	(416) 323-9090	(416) 323-0181	cbannon@janview.com
Pacific Spirit Tours	Doug Banner General Manager	(604) 683-0209	(604) 683-6027	doug@pacificspirittours.com
SNV International	Cathy Holler Vice President Marketing	(604) 683-5101	(604) 683-5129	choler@snvintl.com

The tour companies were chosen based on the recommendation of Cathryn Holler, VP of Marketing for SNV International, who also provided detailed input into the selection of the short list of products/activities. With its head office in Vancouver, SNV is one of the largest international tour companies in Canada and Ms. Holler has worked with the Cariboo region tourism sector for many years.

In terms of their client bases, the firms range in size from 150 to 75,000 clients served in 2000. Five of the firms are tour operators, which develop tours and market them directly to their own clients. SNV International is not only a tour operator but also acts as a wholesaler, packaging and marketing group and FIT tours to travel agencies who in turn market it to their clients, and as a receptive tour operator, working with inbound tour operators to customize tours appropriate for their clients.

Similar to SNV International's experience, all of the other companies surveyed have previously brought visitors to the Central Cariboo, giving them knowledge of the resources in the region. In choosing the tour companies the main consideration was that they could, collectively, provide insight into the appeal of the study area's potential tourism products/activities from the perspectives of:

- The non-resident source markets important to the Central Cariboo, namely North America and Europe.
- The specific market types important to the Central Cariboo, namely ecotourism (including nature, adventure and cultural tourism), or traditional touring (by car, rail or air).
- Both group and FIT visitors.

All six of the tour companies hold good potential as tourism partners for the Central Cariboo's tourism sector. With the exception of Jonview, all of their representatives indicated that they would be interested in working with the study area's tourism sector to develop packages for their clients.

Each tour company representative was asked to rate the fifteen products/activities which scored the highest in the consultants' preliminary evaluation matrix as being Poor, Average, Good or Excellent (in keeping with the ranking scale used by the consultants) in terms of each of the following four criteria:

- Quality and quantity of the resources found in the region that associated with each of the products/ activities.
- Existing market demand for each of these products/activities.
- Trends to increased market participation for each of these products/activities.
- Given the available resources and the market potential, the Central Cariboo's potential for attracting visitors for each of these products/activities.

Attached in **Appendix 12** are the results of the tour companies' assessment, including the individual scores each tour company representative assigned to each tourism product/activity for each criterion, the total scores assigned by each of them for each tourism product/activity, and the average score each tourism product/activity received from all six of the tour companies' representatives.

The tour companies' representatives were also asked whether they agreed with the consultants' assessment of the remaining eleven opportunities as not having as much short-term potential for the study area. They generally agreed with the consultants' assessment, however they indicated a higher market interest in Forestry Interpretive Programs than was anticipated by the consultants. The representatives of tour companies were then asked to evaluate Forestry Interpretive Programs in the same manner as the other fifteen products/activities.

LAC Selection of Tourism Products/Activities

A workshop was held with the Local Advisory Committee to select the shortlist of tourism products/ activities for more detailed assessment from the products/activities that were assessed by both the consultants and tour companies as having the highest development potential. These included the fifteen products listed above and Forestry Interpretive Programs, which were added based on the recommendations of the tour companies. For the purposes of the workshop, the results of the consultants' preliminary assessment and the tour companies' assessment of the sixteen products were summarized in a chart so that they could be compared and discussed.

The scores assigned by the consultants and tour companies for each product/activity could not be directly compared because of the different criteria were used in each of the assessment, but the rankings assigned by each of them could be. While the rankings were similar for some products/activities, others were ranked very differently. Differences in rankings were found to be attributed to a number of factors including:

- The consultants used a much broader range of evaluation criteria which included economic development and social and community impact considerations, while the tour companies criteria focused mainly on market factors. This would create differences in cases, for example, where two products/activities were deemed to have similar market appeal but one of them was deemed to have much better economic potential for the local community. In such a case, the one with the better economic potential could receive a much higher ranking in the consultants' assessment than would the one with less economic potential. In the tour companies assessment, however, both products/activities would likely receive similar rankings.
- In evaluating market demand, the consultants considered both resident and non-resident visitors, while the tour companies were more focused on non-resident visitors. This difference created significant differences in the scores and, therefore, the rankings that emerged from the two assessment processes.

Using the summary assessment chart as a starting point, the LAC members, with facilitation by the consultants discussed which products/activities should undergo more detailed assessment. Through the course of this process, it was decided to take a different approach to Working Ranch Experiences, initially visualized as a multi-day experience where visitors would stay at a working ranch for several days, taking part in a variety of hands-on experiences. The change, which was based on the input of the tour companies' representatives, who indicated that most visitors would rather visit a working ranching only for a day experience, was to include working ranch programs (as just one component of Western theme tourism) in the more detailed assessment.

In addition, it was decided that snowshoeing/cross-country skiing be added to list of the sixteen high development potential products because these complementary activities occur in the winter and there is a need for winter product in the area.

Following these decisions, the LAC determined that the following nine products/activities would undergo more detailed assessment:

- Destination Lodge
- Western Theme Tourism
- Freshwater Fishing
- Horseback Trail Riding
- Mountain Biking
- Hiking
- Nature Observation
- Winter Tourism (cross-country skiing/snowshoeing, dog sledding, etc.)
- Scenic Driving Tours

It is important to note that Aboriginal tourism was not treated in the same manner as the other products in regard to the more detailed assessment of products. While representatives of the First Nation communities were invited to sit on the LAC and participate in the development of the Tourism Opportunities Study, there was, unfortunately, no Aboriginal involvement in the study. Although the LAC believes that the First Nation communities are important tourism partners, and the input from the travel trade also indicates that there is significant market demand for Aboriginal cultural experiences in the Central Cariboo, the committee members recognize that all tourism development initiatives must originate and be controlled by the First Nations communities. The MSBTC is in full agreement with this position.

For this reason, Aboriginal tourism has not been evaluated in the same manner as the other products. However, in an effort to provide the First Nations communities with information useful for their own tourism development initiatives, a section providing general information on Aboriginal tourism has been included.

7.2 Assessment of Tourism Products/Activities

Each of the nine shortlisted tourism products/activities were assessed on a more detailed basis against five categories of criteria: resource criteria, government policy and planning criteria; market criteria; economic criteria, and; social and community criteria. A number of criteria were applied within each criterion category, and a ranking scale was developed for each individual criterion. In the case of the resource criteria assessment, an optimal locations assessment was also carried out to determine which sub-zones within the Central Cariboo (i.e., the Williams Lake forest district area) have the best potential for each of the shortlisted tourism products/activities.

Attached in **Appendix J1** is a description of the criteria and the ranking system used in the assessment. **Appendix J2** provides the detail of the Optimal Locations Assessment and a map that outlines the sub-zone divisions.

A number of maps were also produced to show the specific locations within the Central Cariboo (i.e., Williams Lake study area) where certain of the tourism products/activities could best be carried out. These are attached in **Appendix K** as follows:

- **Destination Lodge** – A map has been produced which shows general areas within 30 minutes of the City of Williams Lake which have potential as locations for a destination lodge.
- **Freshwater Fishing** – A map has been produced that shows those lakes that currently contain sportfish and those lakes which have the potential to be stocked with sportfish.

In addition to these maps, **Appendix K** also contains maps of existing tourism features and use areas which were produced using data provided by Clover Point Cartographics.

7.2.1 Destination Lodge

There is increasing market demand for "destination" lodges/resorts among both domestic and international tourists. The difference between the destination lodge/resort and other types of accommodation facilities is that the destination lodge itself is a primary travel motivator of equal or greater significance than the particular country or area where it is located. In other words, the visitor is not motivated to come to the destination lodge simply because they wish to visit the area where it is located, rather they will come because they want to experience the lodge itself.

Destination lodges which focus on providing ecotourism experiences are generally called ecolodges or nature-based destination lodges or resorts, and are described as nature-dependent tourist lodges that meet the philosophy and principles of ecotourism. At the purist level, they offer the tourist an educational and participatory experience, are developed and managed in an environmentally sensitive manner and participate in protecting the environment around the lodge (Bottrill and Pearce, 1995). Whereas ecolodges were more traditionally quite rustic and basic in terms of their room and cuisine quality levels, in response to market demand, many ecolodges now pamper the visitor with high quality services, including nicely appointed rooms, excellent cuisine and resort-style amenities such as hot tubs and spas.

To help illustrate the differences, **Figure 7.1** provides a comparison of the traditional resort and the ecolodge/nature-based destination resort:

Figure 7.1: Comparison of Traditional Resorts and Ecolodges

Traditional Resort	Ecolodge
• Luxury	• Comfortable basic needs
• Generic style	• Unique character style
• Relaxation focus	• Activity/education focus
• Activities based on built attractions	• Nature/recreation-based activities
• Enclave development	• Development integrated with environment
• Group/consortium ownership common	• Individual ownership common
• Profit maximisation based on high guest capacity, services and price	• Profit maximisation based on strategic design, location, low capacity, services, price
• High investment	• Moderate/low investment
• Key attractions are facility and surroundings	• Key attractions are surroundings & facility
• Gourmet meals, service and presentation	• Good/hearty meals & service, often a cultural influence
• Market with a chain	• Market (normally) independently
• Guides and interpreters rare	• Guide & interpreters focus of operations

Source: Russell, Bottrill & Meredith 1995

7.2.1.1 Resource Assessment

Available Resources

The most critical resource requirements for a destination lodge include a scenic site that provides a sense of being close to nature, being located in or near an environmentally significant area, such as a protected area or nature reserve and either having an on-site trail system or having good access to one.

Several of the tour operators interviewed for this project indicated that the lack of a destination lodge near the main transportation facilities in Williams Lake (i.e., airport, rail station) is a primary impediment to tourism development in the region. Their opinion was that that a lodge located in a natural area within no more than 30 minutes of Williams Lake that focuses on serving the US and international market is needed. The travel trade representatives indicated that Tyee Lake Lodge, the only lodge in the study area that qualifies as a destination, is too far from Williams Lake to meet their clients' needs.

The locational criteria assessment also indicated that the Williams Lake sub-zone holds the best potential within the Central Cariboo as the location for an ecolodge. The potential of each sub-zone as a location for a destination lodge was assessed as follows (see **Appendix J2**):

- Williams Lake obtained the high score based on abundant services and amenities, and potential for a variety of year round activities.
- Beaver Lake, Grasslands, South Chilcotin and Taseko Lake scored moderately high, because of their accessibility and established range of activities.
- Palmer and Gaspard are relatively remote, and highly impacted by industrial/commercial use.

Given that the travel trade interviews indicated that a destination lodge within 30 minutes of Williams Lake would greatly benefit tourism development, Williams Lake is the sub-zone within which optimal locations should be sought. Several potential locations have been identified by the LAC which provide the scenic beauty and sense of isolation that are important for a destination lodge, but yet are near to transportation facilities. Many of these locations are on Williams Lake band reserve land or private lands. Site inspections have not been carried out on any of these sites, nor have the Williams Lake band or any of the private owners been contacted to determine whether they would have any interest in developing a lodge. Some suggested locations are as follows, and general areas that may be suitable are outlined on the corresponding map in **Appendix K**:

- 150 Mile House area – There are a number of potential locations for a lodge in the area, including private lands both south and north of the village site. In addition, the area between 150 Mile House and the San Jose area holds potential, although no specific sites have been identified.
- South end of Williams Lake – Some of the land in this area is Williams Lake band reserve land, and the construction of a lodge there could provide partnering and/or joint venture opportunities between the band and the City of Williams Lake and/or private investors.
- West Fraser Road – A privately-owned property on this road, which has been for sale for some time, may be suitable for a destination lodge.
- Williams Creek area – Has the scenic vistas, grasslands and forested areas that are appropriate for a destination lodge but access is very difficult.
- Pablo Creek area – Has potential because it is in the vicinity of the proposed De Sous PAS Goal 2 area. However, a lodge in this area would have to be carefully managed in terms of environmental impacts.

Product Frequency

Compared to the neighbouring Chilcotin area, there are few lodges in the Central Cariboo. The ones that do exist are generally located on or near lakes and are quite distant from Williams Lake. According to the tourism operators database, there are five lodge/resorts in the study area. The only one of these that could be classified as a destination lodge, the Tyee Lake Lodge, has been closed and for sale for several years. The others focus only on hunting, fishing and/or lake recreation activities or are oriented to the overnight stay traveller. They are generally not of the calibre required to meet the demands of a destination lodge client.

Supporting Infrastructure

Along with the main accommodation facility and supporting buildings, destination lodges require the entire range of infrastructure related to the provision of utilities and sewage facilities. Depending on where the lodge is located, road construction may be required. If the destination lodge is not located near a park or other natural area that has a trail system, trail construction could also be necessary. If the destination lodge intends to have an outpost facility, buildings and other associated infrastructure could also be required. Roads may also have to be constructed to enable access to the destination lodge.

Resource Assessment Summary

Resource Assessment Summary – Destination Lodge	
Quantity of associated resource	Low
Quality of associated resource	High
Optimal resource units	Williams Lake
Quality of resource compared to other BC	Moderate
Quantity of resource compared to other BC	Moderate
Product frequency	Low
Supporting infrastructure	Low - Moderate

7.2.1.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Given that some of the available locations for a new destination lodge may be on Crown land and given the intensive and long-term nature of a lodge development and operation, a proponent might be required to apply for a Commercial Recreation Long Term Site Specific Use lease from BC Assets and Lands Corporation. Such a lease generally provides exclusive use to a small parcel of land, normally one hectare or less, and carries a maximum term of 20 years. Granting of a lease would be subject to an approved legal survey, management plan, performance targets, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Meeting many of these requirements can be costly as specialists must be contracted to provide their independent services. Additionally, an annual payment of rent must be paid by the proponent to BCAL.

Should the proponent also wish to include activities for guests which require accessing Crown land outside the lease area for the lodge and depending on the nature of these activities, licenses of occupation for Long Term Use of an Extensive Area and temporary permits for Short Term Low Impact Use may also be required from BCAL. Alternatively, the lodge operator could contract the services of independent guides who in turn would require such licenses or permits. However, in this instance, to ensure the safety and satisfactory experience of lodge patrons partaking in these activities, the lodge operator should confirm that adequate measures including insurance coverage are provided by the contractor and a performance agreement should be entered into.

In addition, a destination lodge would also require zoning approval from the CRD.

Government Policy Assessment Summary

Government Policy Assessment Summary – Destination Lodge	
Tenure / licensing / other requirements	Yes

7.2.1.3 Market Assessment

Market Demand and Characteristics

Research on accommodation preferences has found that ecotourists prefer intimate, adventure type accommodations, such as lodges/inns, cabins and B&Bs. Moreover, general travellers are also developing a preference for such smaller, more intimate accommodations (Hawkins et al, 1995; Selengut, 1995; HLA Consultants, 1996; Wight, 1997).

Research performed by ARA on the accommodation preferences of North American ecotourists interested in visiting BC and Alberta likewise found that experienced ecotourists were more likely to prefer more intimate accommodation types, especially cabins, lodges/inns and B&Bs. The majority of general interest ecotourists interested in visiting BC identified hotels/motels as their accommodation preference, but they are also interested in a variety of other accommodations including lodges/inns, cabins and B&Bs. The results of this research are summarized in **Figure 7.2** (HLA/ARA, 1994).

Figure 7.2: Accommodation Preferences of Ecotourists

Accommodation Type	Experienced Ecotourist	General Interest Ecotourist Interested in Visiting BC
Cabin	66%	18%
Lodge/inn	60%	16%
Tent	58%	22%
Bed & Breakfast	55%	6%
Hotel/Motel	41%	55%
RV	8%	1%

Multiple responses allowed

When it comes to the quality of accommodations, both experienced ecotourists and general interest ecotourists expressed a preference for mid range (56% and 60%, respectively), followed by basic budget (38% and 31%, respectively) , and luxury accommodations (6% and 9%, respectively) (HLA/ARA, 1994).

When it comes to activity preferences, an international survey of ecolodges performed by ARA found that ecolodge clients generally involved a sensory experience with the natural and cultural resources of the area. The most favoured pursuits were trail hiking, nature interpretation, wildlife tours and birdwatching. Also popular were recreation and nature-based activities such as river trips, mountain biking and horse riding. Cultural and heritage activities complementary to the nature and wilderness aspects of the ecolodges were included, although less frequently. Facility-based activities, such as swimming pools and tennis courts were rare. In some cases where such activities were included, they were designed in an inventive nature-inclusive manner, such as an elevated swimming pool among the trees. Most of the activities had an educational aspect, however most importantly they were a vital ingredient of guest entertainment (Russell, Bottrill and Meredith, 1995).

Travel Trade Input

The travel trade interviews indicated that there is significant growth in international demand for Canadian destination lodges offering varied adventure/ cultural experiences during the day and relaxation at night with excellent cuisine and resort-style facilities. They also indicate that it will be difficult to develop the Central Cariboo's tourism sector unless a destination lodge is developed within about one-half hour of the main transportation facilities in Williams Lake.

Seasonality

Given the relatively mild climate of the Central Cariboo and the variety of summer and winter activities available in the study area, a destination lodge could be operated year round.

Market Assessment Summary

Market Assessment Summary – Destination Lodge	
Appeal to existing tourism markets	Moderate
Market growth trends	High
Origin of potential visitors	N America, International
Compatibility with other products	High
Seasonality	High

7.2.1.4 Economic Assessment

Revenue potential

In general terms and subject to market and other conditions, a well designed and operated destination lodge in the study area can expect relatively high expenditure levels, generally short lengths of stay and highly seasonal patterns of patronage by lodge guests. As a result, the destination lodge can expect to achieve moderate occupancy levels and moderate to high levels of operating revenue. This can be supplemented by encouraging day and off-season use by local residents and businesses for meetings and special events.

Businesses in the study area can also benefit by selling supplies and services to the lodge, providing transport to lodge guests and the like.

Employment potential

The employment potential of a destination lodge for the study area is considered moderate to high.

In most instances, destination lodges are owner-operated or operated by a manager contracted by the owner(s). The latter arrangement is recommended when the owner has little or no experience in the hospitality industry. However, it is more costly as a market rate salary must be paid to attract a qualified manager.

The types of jobs required at a destination lodge include front office, food and beverage service, housekeeping, maintenance and repairs, transportation, guided activity and interpretive staff. They can be of a full-time, part-time and seasonal basis. Some provide moderate income levels while others only pay minimum wage. The existence of a destination lodge often encourages the entree of additional ecotourism operators such as adventure guides, thereby creating additional employment opportunities for the study area.

Assuming that the lodge is located within a 30-minute drive (in good weather) from the City of Williams Lake, hiring local residents as staff for the lodge should not be difficult. It is also considered a best practice in ecolodge operation, contributing to local area job creation objectives. Also, if only minimal or no employee housing is required, capital and operating costs for the lodge can be minimized. However, training will be required to develop the necessary skill set and to meet the standards of service expected by patrons.

Seasonality of patronage can be an issue in securing reliable staff. Efforts can be made to extend the lodge's season of operations, to share staff with complementary operations whose seasons are opposite to the lodge and to recruit students from hospitality training institutes seeking short term job experience.

Capital requirements

Given the nature of the facility and in order to attract North American and overseas guests, significant investment is required to develop the physical asset as well as operate, maintain and market the property on an ongoing basis. Assuming the lodge is of a log chalet style with a high standard of fit out and contains say 40 guest rooms as well as meeting space and other common areas, the cost to design and construct would be substantial. Once fully operational and assuming a high level of service is provided, adequate funds would be required to cover annual operating costs for the destination lodge. Even when carefully managed, operating costs for a destination lodge can consume a significant share of operating revenues and net operating losses are common in the initial years of operation. Additionally, annual rent to BCAL for a leased area of Crown land would be calculated as a percentage of market value of the land, with a minimum rent of $500 per annum.

Furthermore, it is often difficult to secure conventional financing for such ventures, as a successful track record, a sound business plan, demonstrated market support and sufficient operating reserves are typically required.

Economic Assessment Summary

Economic Assessment Summary – Destination Lodge	
Revenue potential based on average expenditures	High
Employment potential based on nature / number / duration of jobs and income levels	Moderate-High
Capital requirements	High

7.2.1.5 *Social and Community Assessment*

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

While largely dependent on the intended location, scale, guest preferences and management practices of a destination lodge, its compatibility with local recreation and community uses is expected to be moderate to high. The introduction of a lodge to an area already in local recreation use may result in user conflicts, the displacement of such public use or preferably the enhancement of such use – with the latter possible if the new lodge facilities and services are also made available to the general public and/or if the lodge's development results in other new or improved public facilities (e.g., trails).

Compatibility with Other Economic Uses

Compatibility of a destination lodge with other economic uses is also expected to be moderate to high, again subject to its intended location and scale. As the visual and noise quality of a lodge's setting and environs is important, it is preferable to locate it in an area already under visual and noise management, such as highway or river scenic corridors or a lake viewshed. To avoid conflict, it should generally not be located in close proximity to areas with existing or planned logging or mining activity.

Community Acceptance / Local Economic Development Support Potential

Both potential community acceptance and local economic development support for a destination lodge are seen to be moderate to high. The local community would likely be proud to claim it has a destination lodge and such a development is considered compatible with tourism development objectives for the study area. Depending on the nature of the request, economic development support could come from CFDC, TWL, CCCTA, RDC, WL-EDC and CEAF. However, unresolved Treaty negotiations could be an issue for approval of a destination lodge if proposed for land under claim.

Local Skills Availability

Existing capacity and availability of local skills to develop, operate and staff a destination lodge is considered anywhere from low to high depending on the source. The high development and operating costs associated with a lodge hinder most locals from pursuing such a venture. However, most staff positions could be filled with residents of the study area. However, training in hospitality services and business operations is needed in the study area – and across British Columbia.

Social and Community Assessment Summary – Destination Lodge	
Compatibility with local recreation and community uses	Moderate - High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	Moderate - High
Local skills availability	Low - High

7.2.1.6 Potential

The travel trade input indicates that the lack of a destination lodge that provides a variety of ecotourism experiences and is near to Williams Lake is a primary impediment to the development of the Central Cariboo's tourism sector. The Central Cariboo has many of the assets required for a destination resort including a sense of remoteness, high scenic values, unique natural features, interesting parks/protected areas, abundant wildlife, a wide variety of ecotourism activities, and proximity to an air and rail serviced community.

There is potential for the lodge to also be local-serving in terms of providing conference and meeting facilities. This would help with seasonality issues, however careful management would be required to serve both the visitor and local market equally well.

Given that several of the locations identified are on lands associated with First Nations communities, the destination lodge project may provide an opportunity for the First Nations and the larger community to work together to develop the tourism sector.

To obtain further input on the market requirements to be met in a destination lodge, it is recommended that further consultations be held with the travel trade. Of particular importance is the hotel and convention centre on the R.C. Cotton site in the City of Williams Lake which was first proposed after the travel trade interviews had been completed. It may be that this facility, if built, could satisfy the needs of the tour companies' clients. The travel trade consultations should also address other accommodation facilities upgrades required to meet market needs.

It is very possible that there will be a need to attract an investor from outside the study area to build the destination lodge. This may require the development of a pre-feasibility study that identifies the best location for the lodge, provides information on market demand and requirements, and can be used to present the destination lodge concept to investors. The high costs associated with constructing a lodge and operating it during its initial years of operation, when it may experience significant operating losses, mean that it will be important to attract a well-financed operator who is knowledgeable about operating a lodge or is able to contract the required expertise.

7.2.2 Western Theme Tourism

Culture/heritage tourism is travel that includes participation in a cultural or heritage activity as a significant travel motivator. These activities include attending a festival, fair or exhibition, attending a cultural/heritage event, visiting a museum/art gallery and visiting a historic attraction or site. Globally, demand for cultural/heritage tourism experiences that allow the participant to learn by seeing and doing is skyrocketing and culture/heritage tourism is expected to be one of hottest trends of the 21st century.

As a result of global and national trends, culture and heritage tourism is increasingly being recognized as a generator of economic development and job creation which is leading many communities, especially rural communities, to expand the number and calibre of local events and activities.

Canada's culture/heritage products have significant potential because the country is safe for travel, is bilingual and multi-cultural, has a wealth of natural resources, has links to many countries via immigration, and has made a large public investment in culture and heritage. Within Canada, demand is also growing for learning experiences that put Canadians in touch with their rich culture and heritage. To capitalize on the potential, the Canadian Tourism Commission recently developed a five-year strategy for increasing culture and heritage tourism in Canada.

Agriculture, including ranching, has always been one of Canada's most important industries, and therefore is a key component of the country's heritage. In 1989, the ranching industry was formally recognized as a culture and heritage asset when the national Historic Sites and Monuments Board identified ranching as a theme of national historic significance (HLA/ARA, 1995).

7.2.2.1 Resource Assessment

Available Resources

Ranching is one of the most visible land use types in the Central Cariboo, providing the study area with a very distinctive character. The Williams Lake Stampede is a well known event and there are several other large Williams Lake-based rodeos, including the Little Britches Event and the Indoor Rodeo, and a number of community rodeos held annually in the study area. Other events include roping events, cattle penning, horse shows, training clinics and cattle drives.

The connection between the study area's frontier and gold rush history provides good potential for tourism. This connection exists because the Cariboo Gold Rush played a key role in the development of ranching in the study area. This occurred because, starting in the 1850s, cattle drovers followed the gold mining frontier as it moved up the Fraser and east to Barkerville. During the gold rush era, more than 20,000 cattle were driven into the Cariboo. Among the early drovers were Thaddeus and Jeremy Harper who first arrived in 1862 and later established the Gang Ranch, which became one of the largest ranches in North America (Government of Canada and Government of BC, 1989).

There are a number of historic ranches in the study area, some of which have been in the same family for three or four generations, including the Gang Ranch (has an historic post office, store and cookhouse), the Alkali Lake Ranch (holds the distinction of being the oldest cattle producer in Western Canada), the Empire Valley Ranch (located in Churn Creek Protected Area), the Koster Ranch and the Onward Ranch. The first cemetery in the study area is found near the Sugar Cane Indian Reserve. Several ranches in the area stage cattle drives in the spring and fall, providing potential for the development of an experiential tourism product.

The Museum of the Cariboo Chilcotin in Williams Lake is the home of the BC Cowboy Hall of Fame, which relates the study area's and province's ranching and rodeo stories through a variety of quality displays and programs. The museum also displays artefacts depicting lifestyles of the area's pioneer settlement history. There is also an interesting connection between ranching and cultural development in the area, which can be explored at the Museum and in other locations within the Central Cariboo. This relates to the Cariboo Arts Society, the oldest continuing arts society in BC, the founders of which included Vivian Cowan, the original mistress of the Onward Ranch, and A.Y. Jackson, one of the famous Group of Seven painters.

Other western theme assets in the Central Cariboo include its historic routes and sites, cowboy artists and poets, major and community rodeos, the unique historic and contemporary role of the Aboriginal cowboys and ranchers, and the Williams Lake Stockyard, which holds large cattle sales during the spring, summer and autumn months.

Based on the locational criteria assessment, the Williams Lake and Grasslands sub-zones were determined to have the best potential for western theme tourism development (see **Appendix J2**). Comments on the potential of the study area's sub-zones for western theme tourism are as follows:

- Williams Lake scored highly because of established facilities and easy access. Grasslands did not score highly overall, but has very high potential because of its ranches, which are important western theme assets, and its "western" feel.
- Beaver Valley scored highly mainly because of easy access. South Chilcotin and Taseko Lake also have appropriate facilities, but are more remote.
- Palmer and Gaspard are remote, with fewer facilities.

Product Frequency

The Museum of the Cariboo Chilcotin offers a historical view of the study area's ranching and rodeo history. According to the tourism operators database, seven tourism operators offer horseback riding trail experiences. At least one ranch also works with another local area tour operator in providing trail rides and a taste of the working ranch experience, and several of the First Nations communities plan to or would like to offer wagon rides in the future. However, there are no western theme interpretive experiences offered on an organized basis within the Central Cariboo at this time.

Supporting Infrastructure

Infrastructure requirements for western theme tourism will vary depending on the type of program that is offered. For example, if an existing ranch were to begin to offer a "Be a Cowboy for a Day or a Week" programs, trail or campsite development might be required. However, given that many of the programs developed would revolve around existing events and features, such as ranches, it is assumed that the supporting infrastructure is largely in place.

Resource Assessment Summary

Resource Assessment Summary – Western Theme Tourism	
Quantity of associated resource	High
Quality of associated resource	High
Optimal resource units	Williams Lake, Grasslands
Quality of resource compared to other BC	High
Quantity of resource compared to other BC	High
Product frequency	Moderate
Supporting infrastructure	Moderate – High

7.2.2.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Requirements for tenure, licensing and the like depend on the nature and location of the western theme tourism offerings to be pursued. Leases and licenses are required if proposed for Crown land while planning, building and operating permits may be required for permissible developments and events within municipal jurisdictions and on other private holdings. However, such approvals are not required from the provincial or federal governments if the western theme tourism offering is developed or provided within a First Nations community or reserve.

If permanent improvements or structures (e.g., guest accommodation on a ranch) are proposed for Crown land, a proponent would be required to apply for a Commercial Recreation Long Term Site Specific Use lease from BC Assets and Lands Corporation. Such a lease generally provides exclusive use to a small parcel of land, normally one hectare or less, and carries a maximum term of 20 years. Granting of a lease would be subject to an approved legal survey, management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Meeting many of these requirements can be costly as specialists must be contracted to provide their independent services. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Perhaps the least onerous path when western themed visitor-serving built facilities are required is to provide them on privately-owned land, as long as their intended use is permissible and compatible with existing uses of that and neighbouring sites.

In situations where the proponent wishes to operate guide-outfitting operations and offer themed experiences (e.g., guided trail riding, cattle drives, visits to significant sites and other interpretive tours) or create or maintain trails or minor structures on Crown land, licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Infrequent or non-motorized and otherwise low impact commercial uses without improvements would only require temporary permits for Short Term Low Impact Use from BCAL. However, no tenure is required for one-time low impact guided events. Conducting guided operations within provincial parks would require park use permits.

The conditions associated with granting licenses and temporary permits are generally less onerous as compared with long term leases. One exception noted concerns the added condition for temporary permits that horses must be confined to the existing trail systems suitable for the use and proponents must either pack in weed-free food pellets or obtain approval for grazing from the Ministry of Forests. As with built facilities, providing such activities and experiences on privately-held land is also likely to be easier.

Operators of other ecotourism facilities, such as a destination lodge, may wish to contract the services of western cowboy guides to take their guests on interpretive tours and experiences. This is because many of their guests are seeking direct contact and authentic experiences with local culture. In this instance, a license or permit would be required of the commercial guide if Crown lands are accessed.

Government Policy Assessment Summary

Government Policy Assessment Summary – Western Theme Tourism	
Tenure / licensing / other requirements	Yes

7.2.2.3 Market Assessment

Market Demand and Characteristics

The WTO estimates that 37% of all international trips include a culture/heritage component and this market is growing at a rate of 15% annually. The global market is expected to increase, with aging populations of highly educated, well-travelled baby boomers (CTC, 1999).

The CTC's business strategy for cultural and heritage tourism reports that the Canadian and American markets should be the focus for Canadian culture and heritage tourism over the next five years. It also says that the UK, France, Germany and Japan should be focussed upon over the long term (CTC, 1999). A recent Rendezvous-Canada study likewise found high interest in the American market (33%) in culture/heritage education packages and that 20% of the Asia/Pacific market is looking for such packages. Prices for such tours in Canada range from US$400 to US$2,200 depending on the tour and inclusions (Arsenault, 2000).

Canadians are very interested in culture and heritage. In 1992, over half of those 15 years and over visited a museum or art/gallery (56%) or attended a festival, fair or exhibition (51%). This interest is also displayed when they travel. In 1996, Canadians took over 14 millions trips on which they participated in one or more culture/heritage activities. In total, these travellers spent about $3 billion. Relevant characteristics of Canadian culture/ heritage travellers on a domestic trip include (Mc Dougall, 1998):

- 20% attended a festival, fair or exhibition, 18% visited a museum or art gallery, 17% visited an historic site, 17% attended cultural events.
- Compared to other leisure travellers, they are more likely to be women (54% vs 50%), have a university/college education (45% vs 41%) and have incomes over $60,000 (27% vs 22%). They are also less likely to be married (51% vs 55%).
- Compared to other leisure travellers, they tend to travel farther (565 km vs 343 km), stay longer (4.8 nights vs 3.0 nights) and have higher average overnight trip spending ($255 vs $113).
- They are more likely to use commercial accommodation than are other leisure travellers (36% vs 23%).
- The majority (55%) of their trips are taken in the summer (July, August, September).

The 1999 *Strategic Directions for Culture and Heritage Tourism in British Columbia* study provides insight on the BC culture and heritage tourism market. The study used data derived from the surveys conducted for the *BC Visitor Study* to develop estimate of culture/heritage traveller volumes and analysed other research on culture and heritage tourism to BC. The study reached a number of conclusions on culture and heritage tourism in BC that are of relevance to the Central Cariboo Tourism Opportunities Strategy (Lee and Williams, 1999).

- In 1996, the non-resident culture/heritage traveller volume was estimated at 6.1 million potential visits, while the resident traveller volume was estimated at 5.1 million potential trips.
- In terms of BC primary tourism markets, the overseas travellers express the most interest in cultural tourism travel, with 32% of UK, 41% of German, and 45% of Japanese travellers

having a general interest in cultural activities. For these markets, cultural tourism ranks second only to interest in outdoor activities.

- Cultural travel is also important to Canadians. Cultural travel was cited as an important travel motivator by 25% of Canadians (not including BC), while 28% of the BC resident travel market places importance on cultural travel activities.
- Significant portions of all of the province's primary markets (with the exception of the US, for which insufficient research exists) place importance on cultural activities, and market opportunities exist for the development of cultural tourism experiences.

Culture and heritage tourism is also popular among US travellers. According to the Travel Industry Association of America, about one third of all US adults who took a trip in 1997 visited a historic site or cultural attraction while travelling, translating to a market of 65.9 million people per year. These travellers spent an average of US$688 per trip, about $200 more than the US average. They also tended to stayed longer than other visitors. US culture/heritage travellers tend to be baby boomers (Hargrove, 1998; National Trust for Historic Preservation, October 2000).

The *BC Visitor Study* provides insight into the potential provincial market demand for specific cultural and heritage-related attraction categories, namely historic sites and art galleries/museums. Based on the visitor participation rates reported in the study, as shown in the following table, the potential market for heritage sites is estimated at about 6.5 million adults while the market for art galleries/museums is estimated at about 4.9 million adults. All of the non-resident markets show high interest in visiting heritage sites. In the case of visiting art galleries/museums, interest levels are lower but still strong among all of the non-resident markets, with the Long Haul US (52%), Long Haul Canada (40%) and Asia/Pacific (40%) markets expressing the most interest.

Figure 7.3: Potential Heritage Sites and Art Galleries/Museums Market for BC

	Number of Overnight Visitors	Participation in Visits to Historic Sites	Participation in Visits to Art Galleries/Museums	Number of Historic Sites Visitors	Number of Art Gallery/Museum Visitors
BC Residents	10,762,000	18%	13%	1,937,160	1,399,060
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	35%	23%	1,209,600	794,880
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	45%	36%	1,093,950	875,160
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	66%	52%	1,104,180	869,960
Long Haul Canada (Rest of Canada)	1,146,000	51%	40%	584,460	458,400
Asia/Pacific	797,000	44%	40%	350,680	318,800
Europe	508,000	53%	32%	269,240	162,560
Total Size of the Potential Historic Sites & Art Galleries/Museums Markets				**6,549,270**	**4,878,820**

Source: Tourism British Columbia 1998; ARA calculations.

When it comes to the western heritage theme tourism specifically, the findings of a survey (approximately 1000 respondents) conducted for Canadian Heritage in 1995 show that there is strong interest in BC and Alberta for this type of product. The study found that 50% of respondents were interested in a ranching theme for a historic site. The survey also found that the five top western theme activities associated with a western theme heritage site are (HLA/ARA, 1995):

- History/biography/seeing the way things were done (22%)
- Old equipment/machinery/artefacts/real ranch setting (13%)
- Real life ranch/living ranch/acting lifestyles/period costumes (12%)
- Trail rides/horse rides (7%)
- Animals/horses/cattle (7%)

Travel Trade Input

Given the Central Cariboo's distinctive western image, its many historical and living assets, and the growing demand for culture and heritage "Ed-ventures", the travel trade representatives felt that the development of western theme tourism presents one of the best tourism development opportunities for the Central Cariboo. However, they stressed that most people would be looking for multi-faceted experiences combining western theme activities with other ecotourism/adventure tourism experiences, such as fishing and wildlife viewing.

Seasonality

Given the outdoor nature of most western activities and the seasonal weather patterns in the Cariboo Chilcotin, most western theme tourism is likely to occur during the summer months. However, given the opportunity for educational programming there is potential for some year round activity.

Market Assessment Summary

Market Assessment Summary – Western Theme Tourism	
Appeal to existing tourism markets	High
Market growth trends	Moderate - High
Origin of potential visitors	BC, North America, International
Compatibility with other products	Moderate - High
Seasonality	Low - Moderate

7.2.2.4 Economic Assessment

The array of potential western themed tourism products and activities (e.g., from say a one-day admission to an annual rodeo event to participation in a multi-day cattle drive with food and lodging included) is so broad that an economic assessment is difficult to undertake. For the purposes of this preliminary assessment, it is assumed to include single and multi-day interpretive programs and activities, often combined with other ecotourism activities.

Revenue potential

Given the anticipated variety in the range of interpretive programs and activities and associated patronage and expenditure levels, lengths of stay and seasonal patterns of patronage, western theme tourism products and activities can expect to generate anywhere from low to high levels of annual operating revenue.

In most instances, western theme tourism products and activities would be offered either directly by the owner or operator of an existing facility (e.g., a rancher could involve tourists on cattle drives) or event (e.g., the rodeo event organizer could sell admission tickets to tourists to spectators of the event) or by a concessionaire contracted by the owner, operator or organizer. The latter arrangement is recommended when the owner, operator or organizer has little or no experience in the hospitality industry. Under such an arrangement, the owner, operator or organizer would typically receive only a portion of the revenue proceeds earned by the concessionaire under a contractual arrangement in which the concessionaire would pay the owner, operator or organizer a fixed sum based on a minimum or average level of anticipated earned revenue and with or without an additional payment based on a percentage of revenue or profit exceeding the agreed upon base sum. As the concessionaire would generally incur all or most of the operating expenses associated with the venture, the concessionaire would assume most of the risk.

Businesses in the study area can also benefit by selling supplies and services to the operators of the western theme programs and activities, providing transport to their patrons and the like.

Employment potential

The types and numbers of jobs required for western theme tourism products and activities vary with the nature of the offering, with employment potential rated as low to moderate. They can include front office reservations and reception, food and beverage service, maintenance and repairs of required infrastructure and equipment, animal care, transportation services, entertainment and guided activity and interpretive staff. They are more likely to be of a part-time and seasonal nature, though staff may be required on a year round basis for such tasks as reservations, marketing and animal care. Some provide moderate income levels while others only pay minimum wage. Western theme tourism operations can employ individuals already employed in the ranching and "western" industry as well as new employees with more tourism expertise.

Given market preferences for a range of experiences not limited solely to one theme, the western theme tourism sector can both help expand existing complementary tourism operations and attract additional ecotourism operators such as fishing guides, thereby creating additional employment opportunities for the study area.

The intended location and nature of the proposed western theme tourism products and activities will largely dictate whether hiring employees of existing operations and local residents as staff will be difficult and whether employee housing and training will be required.

Seasonality of patronage can be an issue in securing reliable staff. Efforts can be made to share staff with complementary operations whose seasons are opposite to the lodge and to recruit students from hospitality training institutes seeking short term job experience.

Capital requirements

Capital requirements can be anywhere from low to high as the nature and scale of the proposed products and activities will dictate the extent of funds required to both develop and operate them.

Existing operators will likely find it easier to access funds and ride out the potentially difficult start up periods than newcomers. Careful management of operations will improve operating performance, by maximizing revenue, minimizing operating costs and focusing on costumer satisfaction.

Economic Assessment Summary

Economic Assessment Summary – Western Theme Tourism	
Revenue potential based on average expenditures	Low - High
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - High

7.2.2.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

No major conflicts with local recreation and community uses are anticipated given the general nature of potential western theme tourism activities assumed at this time and how they align closely with existing themes for the study area. Compatibility with local recreation and community uses is therefore expected to be high.

Compatibility with Other Economic Uses

Compatibility with other economic uses is also expected to be high as western theme tourism aligns closely with the existing ranching industry and associated activities and events such as the Stampede. Local ranches and woodlots will likely be used as part of the resource base for some of the potential themed product offerings.

Community Acceptance / Local Economic Development Support Potential

Community pride in its western and cowboy heritage is indisputably strong. Western theme tourism development is also compatible with local tourism development objectives for the study area. Depending on the nature of the request, potential sources of assistance should be readily available and could potentialy include TWL, CCCTA, CWL-EDC, RDC and CEAF. Therefore, both potential community acceptance and local economic development support are seen to be high.

Local Skills Availability

In general terms, existing capacity and availability of skills to develop and operate western theme tourism facilities, interpretive programs and other related activities is considered high. Numerous individuals with local expertise and experience in western heritage can be drawn from numerous ranching families, the 4H, the Stampede Association and the First Nations community. However, training in tourism services would have to be provided.

Social and Community Assessment Summary – Western Theme Tourism	
Compatibility with local recreation and community uses	High
Compatibility with other economic uses	High
Community acceptance / local economic development support potential	High
Local skills availability	High

7.2.2.6 Potential

The development of western theme tourism makes sense for the Central Cariboo because it capitalizes on the study area's best known and most enduring image. Most importantly, western theme tourism differentiates the Central Cariboo from most other regions in BC, and even in Canada, which do not have the historical or contemporary assets to promote this tourism theme.

The study area's many western theme resources lend themselves to the development of single and multi-day interpretive programs, which fits well with the trend today to more travellers wanting authentic, "behind the scenes" experiences. There is the potential to develop various levels of interactive learning programs including "how to…" programs (e.g., be a cowboy for a day), historical re-enactments, cowboy sing-a-longs, poetry readings, ranch tours, branding & roping demos, and covered wagon rides. However, since this tends to be a sophisticated market, success requires that the experiences offered be authentic, high quality and, in many cases, customized to meet individual needs and expectations. In addition, as per the travel trade input, to meet current market demands it will be important that western theme tourism offerings be packaged with other ecotourism experiences to create a multi-faceted experience.

The 1999 *Strategic Directions for Culture and Heritage Tourism in British Columbia* study identified three underlying conditions that must be met for a community to take full advantage of cultural and heritage tourism development. As applied to the situation in the Williams Lake area, these conditions are:

- **Community Support and Involvement** – The involvement of the local community in developing complementary products and services will be key in advancing western theme tourism in the study area, as will be making existing "western" venues, activities and events more receptive and inviting to tourists. The support of the local community in terms of generating positive word of mouth and influencing visitors and friends to take in cultural heritage offerings will also contribute greatly to making the study area a western theme tourism destination. For example, the local tourism association should compile a schedule of large and small western theme events so tourists can partake in them.
- **Attraction Sustainability** – To achieve long term sustainability, cultural heritage tourism products must be developed in harmony with the community's values and aspirations to maintain its own heritage and environment. This implies that the entire community must get behind the idea of making the Williams Lake area a western theme tourism destination, and that operators involved in product development are careful to obtain input from knowledgeable members of the community as they develop their products and services.
- **Management Commitment and Capability** – To become a western theme tourism destination, cultural and heritage tourism must be an integral part of the tourism agenda in the study area. The study area has shown commitment to cultural tourism in that the CCCTA has

a cultural tourism coordinator and the banding together of communities including Quesnel, Williams Lake, 100 Mile House and Lillooet to undertake initiatives to develop Gold Rush theme tourism. This commitment needs to be expanded to include western theme tourism, and initiatives similar to those pursued by the GRTDC should be forwarded. These include the development of a complete inventory of western tourism resources, including built and human resources, investigation of other successful cultural tourism destinations and initiatives, market research and analysis specific to western theme tourism, and development of product development and marketing strategies.

7.2.3 Freshwater Fishing

There are three main groups of sport fishers:

- **Independent Anglers** – create their own fishing experience either from shore or a boat, and also make their own accommodation, food, transportation, boat rental, and fishing equipment and supplies arrangements.
- **Charter Angler** – purchases one day or multi-day guided fishing experiences from a charter guide, who provides the boat and some or all of the fishing equipment and supplies. This angler generally makes their own accommodation, food and transportation arrangements.
- **Lodge Angler** – typically purchases from a lodge operator an all-inclusive fishing package, which may include boats, bait and equipment, guides, food, accommodation and transportation.

BC has a reputation as a world class fishing destination, attracting anglers mainly from North America and Europe to its excellent saltwater and freshwater resources. Recreational fishing, or sportfishing, is consequently one of the most important products in BC's tourism industry, generating significant tourist revenues from non-resident and resident spending. In 1999, BC Fisheries estimates that the freshwater sportfishing sector generated about $345 million in revenue and supported about 3,300 jobs (BC Fisheries, no date-b).

7.2.3.1 Resource Assessment

Available Resources

The Cariboo region has the greatest potential of all the regions in BC for freshwater fishing. Although Williams Lake does not have as high a profile as the neighbouring areas of 100 Mile House, Quesnel and the Chilcotin as a freshwater fishing destination, it follows these areas as being the fourth most productive region in the Cariboo region, and also has the advantage of providing a less crowded experience. It has good sportfishing rivers and streams and many under-utilized lakes that are suitable for sportfishing. These provide a diversity of fishing opportunities, including family, recreational, competitive and wilderness experiences. The Central Cariboo's fly fishing resources are virtually untapped, providing potential to capitalize on a growing market. The study area offers a variety of sportfish species such as Kokanee and Chinook salmon, Steelhead, Sturgeon, Rainbow Trout and Bull Trout.

The study area has a significant advantage for further developing its fishing-related tourism potential in that the Lake Classification process has been completed as part of the land use planning process. The Lake Classification process comes under the Operational Planning Regulations of the Forest Practices Code, and establishes guidelines and sets standards for managing the lakes and their surrounding Lakeshore Management Zones. Using a fisheries rating guide, the process also identifies those lakes that have sportfishing tourism potential, enabling land use managers to make informed decisions on which lakes should be stocked with hatchery stocks.

Under the Lakes Classification process, 84 lakes in the study area have been identified as having good future potential. A number of these lakes have wild stocks, while other have either been fully stocked or augmented with hatchery stocks, mainly rainbow trout. Others have the potential to be stocked when demand warrants. **Figure 7.4** shows the lakes that contain sportfish. The map attached in **Appendix K** provides an overview of both the lakes that currently contain sportfish and those which have the potential to be stocked.

Figure 7.4: Lakes Containing Sportfish

Bareass Lake✱	
Beaver Lake◆	
Big Lake	(hatchery)
Blue Lake	(hatchery)
Brigham Lake	
Brunson Lake	(hatchery)
Chambers Lake	
Chimney Lake✱	(hatchery)
Cook Lake✱ ✖	(hatchery)
Dantes Lake	(hatchery)
Dugan Lake✱ ❄	(hatchery)
Elk Lake✱ ✖	(hatchery)
Fir Lake✱ ▲	(hatchery)
Fish Lake (Hungry Valley) ◆	
Forest Lake✱ ▲	(hatchery)
Gaspard Lake◆	
Howes Lake	(hatchery)
Jackson Hole✱ ✖	(hatchery)
Joan Lake	
Jones Lake✱	
McLeese Lake✱ ❄	(hatchery augmented)
Mons Lake	
Opheim Lake	
PGE Reservoir (Pine Valley) ❄	
Raven Lake✱ ❄	(hatchery)
Rose Lake	(hatchery augmented)
Roster Lake◆	(hatchery augmented)
Sherwood Lake◆	
Skulow Lake	(hatchery)
Squawk Lake◆	
Swartz Lake◆	
Tyee Lake❄	

✱ Best Fishing Lakes
▲ Best Fly Fishing Lakes
❄ Best Ice Fishing Lakes
✖ Restricted to Fly Fishing
◆ Lakes providing remote wilderness experience (access only by four wheel drive access or hiking trails)

Based on the locational criteria assessment, the Williams Lake and Beaver Valley sub-zones were determined to have the best potential for freshwater fishing development (see **Appendix J2**). Comments on the potential of each sub-zone for freshwater fishing are as follows:

- Williams Lake scored highest for its abundance of lakes and easy access. Beaver Lake did not score highly overall but has the best potential in terms of the distribution of lakes already stocked with sport fish and lakes with commercial fishing potential.
- Other sub-zones have good fishing in more remote lakes, but access is more of an obstacle.
- Palmer and Gaspard scored lowest because of difficult access and their industrial focus.

Product Frequency

According to the tourism operators database, there are only two operators offering freshwater fishing charters in the Central Cariboo. An interview with one of these operators indicates that these charters often focus on bodies of water located outside the Central Cariboo. Three tourism operators offer sportfishing as an activity, while 11 others offer general fishing.

Supporting Infrastructure

Logging and other roads allow good access to most of the premier sportfishing lakes in the region. Assuming that the sportfishing experience is provided using an existing accommodation facility, the only other infrastructure required is docks for launching boats, which are in place on many of the lakes that are favourable for boat-based fishing. The guidelines of the Lakes Classification Process will be considered prior to the approval of the development of any new infrastructure.

Resource Assessment Summary

Resource Assessment Summary – Freshwater Fishing	
Quantity of associated resource	High
Quality of associated resource	High
Optimal resource units	Williams Lake, Beaver Valley
Quality of resource compared to other BC	Moderate
Quantity of resource compared to other BC	High
Product frequency	Moderate
Supporting infrastructure	High

7.2.3.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

In order to sustainably manage freshwater sport fishing, guiding operations for freshwater fishing are highly regulated and non-salmon freshwater fisheries are managed by BC Fisheries. Commercial angling guides operating in British Columbia require an Angling Guide License to assist or transport anglers in freshwater or between angling sites. With funding from Fisheries Renewal BC, the province is now reviewing the Angling Guide Management System for the dual purpose of a) evaluating the government's role in managing the freshwater guiding industry and angler effort on BC's special waters, and b) developing ways to improve and enhance the system. Final recommendations are expected by Spring 2001. However, this review does not affect the application process for angling guides currently in effect.

To apply for an Angling Guide License, a potential guide must submit an application form and a proposed Angling Guide Operating Plan(s) (AGOPs) to the Fish and Wildlife office in the region where intending to guide. The Plan outlines the intended angling guiding business and the waters proposed to guide. An exam must then be completed prior to receiving the license. Topics covered include regional fish species, safety procedures and relevant components of and regulations associated with the Wildlife Act and the Canadian Fisheries Act. Separate applications are required for each region in which the guide intends to operate. Each application further requires an AGOP specific to that region. Once approved, the AGOP(s) becomes an appendix to the guide's Angling Guide License.

New angling guides are required to submit their application and AGOP(s) by January 15 of the calendar year for which they plan to guide. Returning angling guides who are not making changes to their AGOP(s) have until the end of May to submit their applications. If they are making changes, they must also submit their applications and revised AGOP(s) by January 15.

Recreational fishing licenses are also required of individual freshwater anglers 16 years of age or older. Youth and First Nations individuals are exempted. For non-tidal angling licenses, there are annual, one day, 8-day licenses as well as discounted licenses for the elderly and handicapped, with fees ranging from $5 for an annual license for an elderly individual to $55 for an annual angling license for a non-resident alien of Canada. The annual licenses are valid for the current license year which starts in April. However, they are not valid in National Parks.

With the exception of salmon fishing and fishing in National Parks, all sport fishing regulations in effect in freshwater in BC are published each Spring in the Regulations Synopsis booklet. There are provincial, regional and water-specific regulations that individual recreation anglers and guides should be familiar with. Changes to regulations are made during the year for specific water bodies as needs arise. Both the Synopsis booklet and subsequent changes are posted on the BC Fisheries website by region.

Remote access, lodge-based fishing and helicopter fishing are not considered as necessary or appropriate for the study area in the short term as promoting existing angling guiding operations and possibly encouraging new ones. This is because of the limited awareness to date of the area's angling potential, the existence of a number of fish camps and the relative ease of access to a number of lakes and rivers with great potential. The destination lodge assessed in **Section 7.2** could be used by sportfishing anglers. Government requirements for a built facility of this nature can be reviewed in that section.

As such, Crown land requirements for long term tenure or landing permits for lodge-based and helicopter fishing have not been carefully examined. However, it appears that if an angling guide wishes to create or maintain a modest overnight fish camp on Crown land on a commercial basis, then a license of occupation for Long Term Use of an Extensive Area would be required from BCAL. Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

Government Policy Assessment Summary

Government Policy Assessment Summary – Freshwater Fishing	
Tenure / licensing / other requirements	Yes

7.2.3.3 Market Assessment

Market Demand and Characteristics

Both Canada and the US show high participation rates in recreational fishing. In Canada, about one in six Canadians 15 years and over (17.7% or 4.2 million adults) took a recreational fishing trip in 1996. For 3.1 million of all Canadian adult fishers, fishing was the main reason for the trip. For BC, the participation rate was 17.5%, equivalent to 537,000 adults. In terms of demographics, recreational fishing was more popular among men than women, among those 45 years of age or younger, and among Canadians with more than a high school education but less than university. The incomes of recreational fishers were higher than the general Canadian population and tended to be in the $30,000 or higher income categories (Environment Canada, 1999).

In the case of the US, almost 44% of the American population 16 years or older participated in fishing in 1994-95, translating into 57.8 million adult anglers. The majority of these (48.8 million) participated in freshwater fishing (Cotrell, 1999). The age demographics show that 61% of US anglers are 45 years or younger and 73% are male. Anglers tend to have slightly higher incomes and educational levels than the general US population (ASA, January 3, 2001). In 1996, recreational fishing attracted 542,000 US visitors to Canada (Environment Canada, 1999).

In recent years, the market for flyfishing for trout has gained significantly in popularity in BC as well as in North America in general and in Europe. It is estimated that the flyfishing market now generates US$600 million annually in retail sales in the US alone (AFFTA, September 19, 2000). A recent survey found that 10.9 million Americans age 16 or older participated in flyfishing in 1998-99, 40% of which were men 45 years or older. Of the total flyfishers, 6.5 million are active fly-fishers, with "active" being defined as someone who went fly-fishing at least three times in the previous year. Meanwhile, 18.3 million Americans over the age of 16 (9%) who have spin cast with live bait wish to try fly fishing (AFFTA, March 1, 1999).

In terms of the BC freshwater fishing market, in 1999/2000, anglers purchased a total of 456,528 freshwater fishing licenses. Of these, 76% were BC residents, 7% non-resident Canadians, and 16% were visitors to Canada (BC Fisheries, no date-a).

The most recent statistics for the Cariboo region are from 1995. In that year, about 65,000 anglers purchased licenses in the Cariboo region, 18% of all anglers in BC. Of these, 77% were BC residents, 5% non-resident were Canadians and 17% were visitors to Canada. Of the BC residents, 43% were from the Cariboo, 23% from the Lower Mainland, 11% from the Thompson-Nicola and 9% from the Okanagan region. In that year, the region captured 12% of all angling days in BC and showed a 30% increase in angling days from five years prior, growing from 500,000 days in 1990 to more than 650,000 in 1995. Compared to BC generally, fewer angling days were spent in the Cariboo region by non-resident Canadians (2% vs 5%), but more were spent by visitors to Canada (9% vs. 5%) (DFO, 1995).

Based on the participation rates in freshwater fishing of resident and non-resident visitors to BC in 1995/96, as shown in **Figure 7.5**, the potential BC market for freshwater fishing is estimated at about 2.1 million adults. All markets, except Long Haul US, appear to have good potential.

There are several significant trends that indicate that the recreational fishing will grow in the future. These include a trend to sportfishing, especially the freshwater variety, becoming more of a family activity, to more participation by women and to more frequent participation by anglers (Cotrell, 1999).

Figure 7.5: Potential Freshwater Fishing Market for BC

	Number of Overnight Visitors	Participation in Freshwater Fishing	Number of Freshwater Fishing Visitors
BC Residents*	10,762,000	12%	1,291,440
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	10%	345,600
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	10%	243,100
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	4%	66,920
Long Haul Canada (Rest of Canada)	1,146,000	not available	not available
Asia/Pacific	797,000	15%	119,550
Europe	508,000	12%	60,960
Total Size of the Potential Freshwater Fishing Market			**2,127,570**

Source: Tourism British Columbia, 1998; ARA calculations.

Travel Trade Input

The travel trade interviews indicate that the diversity of lakes and rivers and the quality of the fishing experience provide an excellent opportunity for the Central Cariboo to draw visitors, especially US visitors, for sportfishing experiences. However, given the study area's existing low market profile a strong marketing campaign will be required to develop US market awareness.

Seasonality

Given that there a number of lakes suitable for icefishing, freshwater fishing in the Central Cariboo is available year round. The season for various open water fishing methods extends from May to October.

Market Assessment Summary

Market Assessment Summary – Freshwater Fishing	
Appeal to existing tourism markets	Moderate
Market growth trends	High
Origin of potential visitors	BC, North America
Compatibility with other products	Moderate
Seasonality	Moderate

7.2.3.4 Economic Assessment

Revenue potential

Pricing and revenue levels for angling guides can vary depending on trip duration, level of service and package inclusions as well as the reputation of the guide and the area. Seasonal fishing conditions, license areas held and regulations and restrictions imposed as well as visitation patterns for the area are other factors impacting pricing and revenue levels. Individual angling guiding enterprises can expect to achieve low to moderate levels of operating revenue, depending on the combination of factors facing the operation. For example, recently established angling guides may be at the lower end because they have not yet developed their reputation or client base, while well established guides would likely be at the higher end as they generally can command higher rates and can be better utilized throughout the year. Performance of angling guide operations can be improved by diversifying their product and activity offerings and broadening their market base to include casual anglers.

Businesses in the study area can also benefit by selling supplies and services to the sportfishing enthusiast and angling guide operator, providing contract transport services and the like.

Employment potential

The employment potential of sportfishing angling guiding operations is also considered low to moderate. In many instances, they are sole practitioner owner-operated or rely on minimal staff. Larger operations which employ more staff are often part of a fishing lodge operation.

Individual sportfishing angling guide ventures typically generate a small number of seasonal jobs, though the positions are very specialized. Seasons can be extended by having expertise in sportfishing different species of fish, securing licenses for several fishing areas and offering icefishing. Income levels are highly dependent on technical expertise, reputation and other factors cited above for revenue potential including nature and scale of operation. Owner/operators may retain a portion of profit earned by the business or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., boat operation) and reputation (e.g., guides). As with revenue potential, employment potential can be enhanced by expanding operations, diversifying product offerings and broadening the market base for the operation.

Hiring local residents to assist with sportfishing angling guiding operations should not be difficult as there are many local enthusiasts and professionals. However, training will be required to develop the necessary skill sets for commercial regulatory compliance, guiding, interpretation and visitor services.

Capital requirements

As noted in the resource assessment, infrastructure requirements for freshwater sportfishing angling guiding operations are largely already in place in several premier sportfishing areas in the Central Cariboo. However new infrastructure such as docks for boats and fish camps might have to be developed to further develop the sector. Nevertheless, the guidelines of the Lakes Classification Process will be considered prior to the development of any new infrastructure.

While existing infrastructure is in place and additional built infrastructure need not be substantial, new angling guiding operations will likely have to provide their own facilities. Also, they may need to invest in the purchase of vehicles, boats and fishing equipment. Therefore, capital required to develop and operate the enterprise can be minimal to moderate in level. Adequate reserves should also be set aside for ongoing maintenance and marketing of the operations.

Annual rent to BCAL for a license of occupation for intensive use sites (e.g., modest fish camp facilities) on Crown land is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Access to capital is known to be difficult for local operators. To help deal with the capital access issue, the industry as a whole should lobby and work with the government and financial institutions.

Economic Assessment Summary

Economic Assessment Summary – Freshwater Fishing	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - Moderate

7.2.3.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Depending on the freshwater to be accessed, the compatibility of fishing by tourists with local recreation and community uses is expected to be moderate to high. This activity is already practiced and accepted in the study area and minimal conflict is anticipated. However, locals can be quite protective of their favourite fishing areas and conflicts can arise on waterbodies receiving high summer day use.

Compatibility with Other Economic Uses

Compatibility of freshwater fishing by tourists with other economic uses of waterbodies and their watershed areas is also expected to be moderate to high, assuming angling guide operations are consistent with lake management goals and recommendations of the Lake Classification Team. Lake class will guide timber harvesting practices within 200 metres of lakes exceeding five hectares in size. However, there will be potential for conflict with forestry, mining and ranching activities on watershed areas as well as with other users of the water resource. As the visual and noise quality of the area in which a waterbody used for fishing is located is also important, it is preferable to use waterbodies in areas already under visual and noise management.

Community Acceptance / Local Economic Development Support Potential

Freshwater fishing, as a tourist activity, is seen to have moderate to high potential community acceptance and local economic development support. It is already practiced in the study area and it is considered compatible with tourism development objectives for the study area. Also, local residents do understand to some degree the value of freshwater fisheries in the study area. Depending on the nature of the request, economic development support could potentially come from Fisheries Renewal BC, TWL, CCCTA, CEAF, RDC, CFDC, CWL-EDC and the Cariboo-Chilcotin Fish Society.

Local Skills Availability

Local skills availability is rated high as guide outfitters specializing in freshwater fishing are available in the study area. However some training is required with respect to working with tourists.

Social and Community Assessment Summary – Freshwater Fishing	
Compatibility with local recreation and community uses	Moderate - High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	Moderate - High
Local skills availability	High

7.2.3.6 Potential

The Central Cariboo's freshwater fishing resources are virtually untapped compared to other highly productive regions in the province. The study area offers a diversity of fishing opportunities that match the needs of a range of markets, including the competitive fisher, the family fishing experience and the wilderness fishing enthusiast. Given the potential for icefishing, the activity is less seasonal than many of the others investigated in this study. There is also much future potential in the many lakes that are suitable for stocking. These facts combined with market trends indicating that freshwater fishing is increasing in popularity indicate that freshwater fishing is one of the best tourism development options for the study area.

The potential of freshwater fishing for tourism development has been recognized by the CCCTA, which employs a full time sportfishing coordinator to promote the activity and increase the region's market share. CCCTA also works in cooperation with the Ministry of Environment, Lands and Parks to promote the industry through attendance at trade shows in the US and Europe. In going forward, these agencies will need to work closely with the operators and the rest of the tourism industry to determine which markets to target coordinate product and packaging initiatives, and develop and implement effective media and advertising strategies. To facilitate market development, it is recommended that research be carried out to learn what competing regions have done to develop their freshwater fishing sector.

On the operator's side (e.g. angling guides), information and education is required in areas such as the available markets, product development and packaging, marketing, business planning and customer service. As capital access has been identified as an issue by local operators, information on financing assistance programs will also be useful. To help deal with the capital access issue, the industry as a whole should lobby and work with the government and financial institutions.

Specific initiatives suggested by operators to assist in the development of the sector include working with the airlines to develop special packages for provincial and US sportfishing markets, and development of web pages highlighting sportfishing on the CCCTA web site.

In order that the sportfishing resources are not depleted as the result of angling guide operations and related tourism development, as has occurred in other regions, it is important that initiatives to protect the resource be put into place as one of the first steps in developing the sector. These include informing and educating visitors and operators on resource issues and resource protection and management, and developing a regional resource management plan through industry and government coordination that addresses issues such as which lakes should be stocked, how guiding days should be distributed and limiting the number of users.

7.2.4 Horseback Trail Riding

Horseback trail riding takes place in diverse locations such as front country trails, rural farms and ranches, and backcountry areas. It allows the visitor, including those with health and fitness concerns to explore rural and wilderness areas. Trail riding experiences range from short excursions of several hours to guided multi-day pack trips. Some trail rides provide a western theme experience, incorporating features such as cowboy style cooking and opportunities to assist with activities such as cattle branding or roundups. These types of trail rides may be originate from or be associated with either working or guest, or dude, ranches. Others provide a wilderness theme experience, providing opportunities for activities such as wildlife viewing and photography and fishing. Trail riding is considered both a soft and hard adventure activity, depending on duration, trail difficulty and the riding experience level.

At 29%, British Columbia is second only to Alberta (36%) as the most popular place for trail riding among adventure travellers in Canada (Tourism Canada, 1995).

7.2.4.1 Resource Assessment

Available Resources

There are many locations in the Central Cariboo where horseback trail riding occurs. There are dozens of trails throughout the region, some of which have been used for centuries by the study area's First Nations and others which were developed by gold prospectors and the early cattle ranchers. Some trails have been developed or improved by local recreation enthusiasts, and a number have been professionally mapped as part of the Cariboo-Chilcotin Adventure Field Guide initiative. The extensive trail networks in Big Creek Park, Junction Sheep Range Park and Churn Creek Protected area are also popular locations for horseback trail riding, providing visitors with opportunities to view wildlife during their ride. The area west of McLeese Lake is another use area, as is Chimney Valley.

Based on the locational criteria assessment matrix, the South Chilcotin and Taseko Lake sub-zones were determined to have the best potential for trail riding (see **Appendix J2**). Comments on the potential of each sub-zone for horseback trail riding are as follows:

- South Chilcotin is an established trail riding area, and Taseko Lake also scored highly for the attractive setting and variety of facilities.

- Williams Lake, Beaver Valley and Grasslands scored moderately high, for the abundant trails and facilities.
- Gaspard and Palmer were not far behind, with fewer facilities and trails, and more industrial focus.

Product Frequency

According to the tourism operators database, there are six tourism operators in the Central Cariboo that offer guided horseback trail riding tours. Horseback riding is also offered as an activity by three other operators.

Supporting Infrastructure

Infrastructure required by horseback trail riding operations includes stables and associated infrastructure for housing horses and as a base for the operations. Much of the infrastructure already exists in the Central Cariboo, however new operations might have to develop the required infrastructure. The existing trail and road infrastructure in the study area is appropriate for horseback trail riding, but a variety of improvements would be required to further develop the sector. These include interpretive signage, public washrooms and garbage disposal facilities. The development of multi-day packages might also require that camping facilities be developed.

Resource Assessment Summary

Resource Assessment Summary – Horseback Trail Riding	
Quantity of associated resource	High
Quality of associated resource	High
Optimal resource units	South Chilcotin, Taseko Lake
Quality of resource compared to other BC	High
Quantity of resource compared to other BC	High
Product frequency	Moderate
Supporting infrastructure	Moderate – High

7.2.4.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Government tenure requirements are subject to the specific intentions of the horseback trail riding proponent. If the proponent wishes to create or maintain private trails and overnight campsites on Crown land and/or conduct trail riding tours on such trails on a commercial basis, then licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Conducting infrequent or otherwise low impact guided trail riding tours on Crown land would only require temporary permits for Short Term Low Impact Use from BCAL. No tenure would be required for one-time low impact trail riding tours. If the trail ride tours were to use public trails, then consent would be required from the Ministry of Forests or other agency with responsibility for the trails in question.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL.

Requirements are less onerous when temporary permits are applicable, except for the added condition that horses must be confined to the existing trail systems suitable for the use and proponents must either pack in weed-free food pellets or obtain approval for grazing from the Ministry of Forests.

Trail systems integral to a destination lodge or other accommodation facility yet outside of that facility's leasehold area would require a license of occupation by the lodge operator in order for trail riding access to be given to lodge guests.

Government Policy Assessment Summary

Government Policy Assessment Summary – Horseback Trail Riding	
Tenure / licensing / other requirements	Yes

7.2.4.3 Market Assessment

In terms of demographics for the Canadian market, more women (53%) than men participate in horseback trail riding. Participation rates are highest in the 20 to 34 years (33%), under 19 years (27%) and 35 to 44 years (27%) categories. Trail riders in Canada are equally likely to travel with friends or as couples. Canadian residents make up about 70% of Canada's horseback trail riding market, with Ontario and Alberta residents having the highest market shares at 22% and 17%, respectively. The US market share is also quite high at 15% as is Germany's at 9% (Tourism Canada, 1995).

Many Canadian adventure travel firms offer trail riding as a primary activity, and many others involved in rafting (20%), hiking (15%) and nature observation (15%) offer it as a secondary activity. Over one-half (52%) of trail riding operations employ professionally certified adventure trail guides. The majority of trail riding packages sold by Canadian adventure travel operators last longer than one day (84%), with about 53% sold as packages customized to meet individual travellers' needs. The average length of a package is five days and the average price is $100 per day (Tourism Canada, 1995).

Participation in horseback riding has been decreasing among US adults, falling by 10% between 1982-83 and 1994-95 (Cordell, 1999). However, horseback riding is the fifth most popular soft adventure activity among US adventure travellers at 12%, representing 24 million adults. More women than men participate in this activity. For the Gen X (18-34 years) and Boomers (35-54) age groups, about 3 of 10 participate in horseback riding. The demographics of US horseback riders are described as follows (TIA, 1998):

- Average age of 35 years
- 43% male/57% female
- 67% married/24% single

- 64% have children at home
- Median household income of US$46,800
- 43% college graduates

Residents of the Southeastern US are most likely to participate in horseback riding (33%), followed by Northeasterners (23%), and, both at 23%, Midwesterners and Westerns. US horseback riders spent an average of US$940 on their last soft adventure trip (TIA, 1998).

Travel Trade Input

The travel trade representatives were very positive regarding the potential of horseback trail riding. They rated it as one of the best opportunities the study area has for developing its tourism potential because visitors coming to the area expect to be able to go horseback trail riding, and the activity has high appeal for the European market. However, they indicated that it would be important to develop multi-experience packages that incorporate the horseback trail riding experience with Western heritage and culture, along with Aboriginal tourism and other ecotourism experiences.

Seasonality

Although horseback trail riding could potentially be carried out year round, it is likely that it would mostly occur in the summer months and, to a lesser extent, the spring and fall seasons.

Market Assessment Summary

Market Assessment Summary – Horseback Trail Riding	
Appeal to existing tourism markets	High
Market growth trends	Moderate
Origin of potential visitors	BC, North America, International
Compatibility with other products	Moderate
Seasonality	Moderate

7.2.4.4 Economic Assessment

Revenue potential

Pricing and revenue levels for guided horseback trail riding can vary depending on trip duration, level of service and package inclusions, reputation of the operation and are also constrained by seasonal weather and visitation patterns for the area. As a result, individual horseback trail riding enterprises can expect to achieve low to moderate levels of operating revenue. This can be supplemented by expanding trail riding operations to include western themed tourism activities (see **Section 7.2.2**).

Businesses in the study area can also benefit by selling supplies and services to the trail riding enthusiast, trail builder or horseback trail riding guide operator, providing feed and care for the animals, transport to the trails and the like.

Employment potential

The employment potential of guided horseback trail riding operations, is also considered low to moderate. In many instances, guided horseback trail riding operations are owner-operated and rely on minimal staff. Larger horseback riding operations which employ more staff are often part of a ranch operation open to visitors and offering other activities as well.

Individual horseback riding ventures typically generate a small number of seasonal jobs, though the positions are more specialized than hiking and other trail-based guiding operations since animal care is required. Income levels are highly dependent on client willingness to pay and other factors cited above for revenue potential including nature and scale of operation. Owner/operators may retain a portion of profit earned by the business or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., animal care) and reputation (e.g., guides). As with revenue potential, employment potential can be enhanced by expanding operations to include other western themed tourism activities.

Hiring local residents to assist with guided horseback riding operations should not be difficult as there are many local riding enthusiasts and professionals. However, training will be required to develop the necessary skill sets for guiding, interpretation and visitor services.

Capital requirements

As noted in the resource assessment, infrastructure requirements for horseback riding operations (e.g., stables, associated facilities for horse care, a base for operations) already exist in the Central Cariboo. However new operations might have to develop the required infrastructure. The existing trail and road infrastructure in the study area is appropriate for horseback trail riding, but a variety of improvements would be required to further develop the sector (e.g., interpretive signage, public washrooms, waste disposal facilities and camping facilities for multi-day packages).

While existing trail systems are in place and built infrastructure need not be substantial, guided horseback riding operations can be small or large operations and their primary "infrastructure " (i.e., horses and equipment) require proper care and maintenance. Therefore, capital required to develop and operate the enterprise can be minimal to moderate in level. Adequate reserves should also be set aside for ongoing trail maintenance and marketing of the operations.

Annual rent to BCAL for a license of occupation for horseback riding trails or guided horseback trail rides on extensive areas of Crown land is calculated at $1/client day, with a minimum of $500 per year. Rent for intensive use sites (e.g., overnight campsites for extended mountain biking) which may be within the extensive area is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Economic Assessment Summary

Economic Assessment Summary – Horseback Trail Riding	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - Moderate

7.2.4.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Depending on the intended trail system, the compatibility of guided equestrian trail riding for tourists with local recreation and community uses is expected to be moderate to high. The increase or introduction of guided equestrian trail rides for tourists on trail systems already under other forms of visitor or local recreation use – such as hiking or mountain biking – will result in user conflicts. However, the existing trail systems are extensive and there is the potential for more to be developed. Therefore, separating trail systems by use is recommended and this can be done through formal (e.g., tenures) and informal (e.g., signage, word-of-mouth) means.

Compatibility with Other Economic Uses

Compatibility of guided horseback riding with other economic uses is also expected to be moderate to high, subject to location. As the visual and noise quality of area in which the trail system is located is important, it is preferable to use or develop such systems in areas already under visual and noise management. To minimize the potential for conflict, trails in areas with existing or planned logging or mining activity should be avoided. Areas used for grazing by ranches should also be avoided, particularly for the purpose of frequently used overnight camps for guided trail rides, so that natural forage is not depleted. Management measures will be required.

Community Acceptance / Local Economic Development Support Potential

Guided horseback riding on trails is seen to have strong potential community acceptance and local economic development support. Williams Lake sees itself as a true "cow town" and that includes a network of trails for horseback riding. This activity is considered compatible with tourism development objectives for the study area, particularly western themed tourism. Depending on the nature of the request, economic development support could come from CEAF, FRBC, CWL-EDC, TWL, CCCTA, RDC, CFDC and Stampede Association.

Local Skills Availability

Existing capacity and availability of local skills to develop, operate and staff guided horseback riding on trails is high. Key areas of required expertise such as horsemanship and hospitality already exist among the study area's ranches, 4H Club and Stampede Association.

Social and Community Assessment Summary – Horseback Trail Riding	
Compatibility with local recreation and community uses	Moderate - High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	High
Local skills availability	High

7.2.4.6 Potential

Its unique history and economy has given the Cariboo region a distinct frontier and western cultural image, and visitors naturally associate horseback trail riding with this image. The region's natural attributes, including its spectacular scenery, varied terrain and diverse wildlife, also contribute positively to the experience.

Considerable background work has been performed on the development of a regional trail network or series of networks in the region. A report prepared for the Cariboo-Chilcotin Economic Futures Committee found that significant economic and recreational benefits would be gained by having a Cariboo-Chilcotin regional trail system. Further investigation of the trail system was performed through Ministry of Forests inventory projects. The system has also been recognized as an economic development priority by the Cariboo Economic Action Forum in 2000 and at the Premier's Summit on Economic Opportunity – Cariboo-Chilcotin in 1999. The latest development in this regard, is a proposal to the Ministry of Community Development for a Coast Mountains Trail System Corridor, which would link the inland Coast Mountains from southeast Tweedsmuir Park to Big Creek to Churn Creek Protected Area and the Fraser River and to the upper Taseko River basin divide with the Bridge River basin (Niut Wilderness Society, 2000). The development of such a network would be helpful for the tourism-related development of horseback trail riding, as well as for hiking, wildlife viewing, mountain biking and other recreation uses.

Horseback trail package development opportunities include developing pack trips featuring wildlife viewing, Aboriginal culture, western culture or other ecotourism activities combined into a themed type of trip and/or day rides from a ranch or accommodation property. For day trips, the operator should be prepared to have riding boots available so they can cater to the visitor who decides to go horseback riding on the spur of the moment. For multi-day trips, equipment such as chaps, sleeping bags, pads and tents should be available and meals should be included. Generally the trails used should be suitable for varying experience levels, and it is important to have well-experienced guides that know the area and its natural attributes and have the ability to work with clients.

To assist with the development of the market, research on market requirements should be carried out and circulated. As well, operators should be provided with access to training in product development and packaging, marketing, business planning, nature and cultural interpretation, and customer service.

7.2.5 Mountain Biking

Two main segments have evolved in the sport of mountain biking: downhill and cross-country. In downhill mountain biking, the focus is on traversing down steep hills over rugged terrain and competitions parallel downhill skiing, featuring downhill, giant slalom and freestyle events. Meantime, cross-country mountain biking involves a variety of terrains and events include short and long cross-country races.

Participation in all types of bicycling has increased greatly over the last two decades largely due to advances in technology. Mountain bike technology in particular has seen the most significant advancements, with new bikes combining the lightweight but rugged construction and all terrain tires. These advances have led to strong growth in participation rates and equipment sales. This is in turn has led to increased use by mountain bikers of off-road trails, backcountry areas, and recreation sites, including downhill skiing sites in the off-season. In addition, competitive mountain biking events are becoming more popular, including mountain biking snow races.

Membership in mountain biking clubs and organizations has also increased greatly in recent years. For example, the International Mountain Biking Association now has more than 28,000 individual members, most of whom live in the US and Canada. Meanwhile, membership in the Colorado-based National Off-Road Bicycling Association (NORBA) grew by 140% between 1991 and 1994 to 23,000. All of these trends are expected to continue in the future, with overall numbers of riders, participation days and numbers and types of events all expected to increase.

In BC, mountain biking takes place on trails and logging or abandoned roads in mountain and forest areas, and in some cases involves the use of helicopters to provide access to biking areas. The most popular areas in BC for mountain biking are the Lower Mainland (especially North Vancouver and Squamish), the Gulf Islands, south Vancouver Island, the Kootenays and the Okanagan.

Mountain biking tends to attract the younger more budget conscious traveller and therefore is a relatively low yield sector in terms of value-added revenues (e.g., guided tours, accommodations, food and beverage sales), but nonetheless can provide significant economic benefits to host communities. A 1996 study conducted in Moab, Utah, one the most popular mountain biking areas in the US provides insight into the economic benefits of mountain biking. It concluded that the economic value of mountain biking to the area amounted to approximately US$8 million annually or about US$200 per trip (based on average per day costs of US$54). This figure was based on the costs incurred by mountain bikers while in the area, including lodging, camp fees, trail entrance fees, bike rental, guide fees and miscellaneous. Food costs were not included (Fix and Loomis, no date).

7.2.5.1 Resource Assessment

Available Resources

The best locations for mountain biking in the Central Cariboo include the trails that have been developed by local enthusiasts for this activity, and for hiking and/or horseback riding. Many of the trails have been professionally mapped as part of the Cariboo-Chilcotin Adventures Field Guide initiative. Following is a brief description of these trails:

- Dante's Inferno Trail – Located about 68 km west of Williams Lake on Highway #20, this 10 km round trip trail provides an easy bike ride. The trail provides an opportunity to experience the Chilcotin plateau, and its main attraction is Dante's Inferno, a beautiful lake of volcanic origin.
- De Sous Mountain Trail – Located about 30 km south of Williams Lake, this two-hour trip provides a highly challenging technical downhill ride and a superb view of the Chilcotin region.
- Fox Mountain Trail (a.k.a. Jimmy's Fox Trail) – provides a 2-3 hour trip, with the trailhead access located near to Williams Lake with easy to advanced sections of single track and several great viewpoints.
- Ravin Trail - extends along a ridgeline overlooking the Williams Creek Valley, ending in a long downhill stretch. Trail highlights include semi Douglas Fir forests, scenic vistas and connections to a series of roads and trails leading down to the creek valley.
- South Side Trails - a trails network that extends across the plateau above Williams Lake. There is a trail for every ability and interest from easy double-track to expert single-track.

- Spokey Hollow Trail – a trail network within easy access to Williams Lake which offers a two to three hour trip, technical challenge, cardio workout, varied terrain, and very high scenic values.
- Ye Olde Boxe Trail – offers a three to six hour technical cross country opportunity near to Williams Lake, with superb viewpoints and challenges.

Another popular location for mountain biking is the Bull Mountain Trails, which are just north of Williams Lake and serve as cross country ski trails in the winter and mountain biking and hiking trails in the spring and summer. They are also the venue for mountain biking events. Mountain biking can also be done on designated trails in Junction Sheep Range Park and Churn Creek Protected Area. Finally, forestry roads throughout the region are also used for mountain biking.

Based on the locational criteria assessment, the Williams Lake, Taseko Lake and South Chilcotin sub-zones were determined to have the best potential for mountain biking (see **Appendix J2**). Comments on the potential of each sub-zone for mountain biking are as follows:

- Williams Lake, Taseko Lake and South Chilcotin all offer appropriate terrain and amenities for mountain biking. What the Williams Lake sub-zone lacks in "wild" aesthetics, it makes up for with a variety of developed trails and very easy access.
- The other regions are relatively close in score, though the combination of remoteness and industrial impacts may reduce their desirability for mountain biking.

Product Frequency

Currently, there are not any operators offering guided mountain bike tours, however, the owner of Red's Shreds Bike & Board Shed is now in the process of setting up a tour operation. According to the tourism operators database, mountain biking is offered as an activity by three tourism operators.

Supporting Infrastructure

The trails already developed and mapped in the Central Cariboo provide much of the infrastructure required to develop mountain biking on a commercial basis. To fully develop the sector, however, it will be important to install signage as well as parking, washroom and garbage disposal facilities. Overnight camping facilities may also be needed to accommodate multi-day experiences.

Resource Assessment Summary

Resource Assessment Summary – Mountain Biking	
Quantity of associated resource	High
Quality of associated resource	High
Optimal resource units	Williams Lake, Taseko Lake, South Chilcotin,
Quality of resource compared to other BC	Moderate - High
Quantity of resource compared to other BC	Moderate - High
Product frequency	Low
Supporting infrastructure	High

7.2.5.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Government tenure requirements are subject to the specific intentions of the mountain biking proponent. If the proponent wishes to create or maintain private trails and overnight campsites on Crown land and/or conduct mountain biking tours on such trails on a commercial basis, then licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Conducting infrequent or otherwise low impact guided mountain biking tours on Crown land would only require temporary permits for Short Term Low Impact Use from BCAL. No tenure would be required for one-time low impact mountain biking tours. If the mountain bike tours were to use public trails, then consent would be required from the Ministry of Forests or other agency with responsibility for the trails in question. Use of public roads by commercial mountain bike tour operators would not require prior approvals.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

Trail systems integral to a destination lodge yet outside of that facility's leasehold area would require a license of occupation by the lodge operator in order for mountain bike access to be given to lodge guests.

Government Policy Assessment Summary

Government Policy Assessment Summary – Mountain Biking	
Tenure / licensing / other requirements	Yes

7.2.5.3 Market Assessment

Market Demand and Characteristics

Mountain bikers prefer a variety of riding conditions. They like to ride in natural forested settings, experience scenery and be challenged. Although they prefer nature environments, they are more tolerant of forestry and other industrial development than are most other types of ecotourists and adventure tourists.

Several studies show that mountain bikers tend to come from younger age groups, with the great majority being under 40 years. Mountain bikers tend to be well-educated professional males, although participation by females is on the rise. Many of them are very committed to their sport, investing significant amounts of time and money in participation in the sport as well as equipment and club involvement.

NORBA has compiled data on its membership which provides insight into the size and the characteristics of the US mountain biking market. NORBA estimates that in 1993 there were 25 million mountain bikers in the US, and that 33,000 new riders participate in this sport each year. In

1993, NORBA members each participated in an average of 5 sanctioned races. The sociodemographics of mountain bikers are as follows:

- 76% are 20 to 39 years
- median age of men is 27 years, and of women is 32 years
- 51% single
- 30% professionals/managers, 17% students, 12% technical
- 46% college degree and 17% graduate degree
- average household income US$52,230

Off-road biking/mountain biking was the fourth most popular hard adventure activity among all US adventure travellers in 1997 at 5%, representing 10 million adults (TIA, 1998).

In terms of the Canadian mountain biking market, participants also tend to be Canadians under 40 years of age. Participants are both male and female, and they usually travel with friends or as couples. Canadian bicycling operators, including both touring and off-road operations, offer their clients equestrian trail riding (23%) and canoeing and snowmobiling (both at 18%) as secondary activities. For combined touring and off-road bicycling, about 90% of bicycling packages are sold as preset packages of an average length of 5.6 days and an average price of $116 per day (Tourism Canada, 1998).

There is no market information specific to the BC mountain biking sector.

Travel Trade Input

The travel trade interviews indicated that the Central Cariboo has an advantage in that it has good terrain for guided bike tours as well as independent touring, but that the market demand for these types of experiences would be limited. It was felt that themed routes where the mountain biker would be able to take in a variety of experiences, such as wildlife viewing and Aboriginal tourism and western theme tourism would help to expand the market for mountain biking. The interviews indicated that the main market for mountain biking experiences in the Central Cariboo would likely be BC residents and, to a lesser extent, the western US.

Seasonality

The majority of mountain biking takes place during the summer months, however the activity does extend into the spring, fall and even the winter seasons.

Market Assessment Summary

Market Assessment Summary – Mountain Biking	
Appeal to existing tourism markets	Low – Moderate
Market growth trends	Moderate
Origin of potential visitors	BC, North America
Compatibility with other products	Moderate
Seasonality	Moderate

7.2.5.4 Economic Assessment

Revenue potential

Mountain biking tends to attract the younger more budget conscious traveller and therefore is a relatively low yield sector in terms of revenues generated by individual operators or the area visited (e.g., guided tours, accommodations, trail entrance fees, bike rentals and equipment sales, food and beverage sales).

The two principle sources of direct revenue for mountain biking include trail fees and fees for mountain bike guiding operations. Trail fees are not generally high, nor are pricing levels for guided mountain biking tours given the pricing sensitivities of the market segment. Also, there will likely be local resistance to imposing fees for trail use, raising equity issues if tourists are charged. As a result, individual mountain biking enterprises in the study area can expect to achieve only low levels of operating revenue. Fortunately, gross margins can be high. Business can be enhanced by expanding trail use and guiding operations to include trail-based winter tourism activities (see **Section 7.2.10**).

Businesses in the study area can also benefit by renting and selling supplies and services to the mountain biking enthusiast, trail builder or guide, providing transport to the trails and the like.

Employment potential

The employment potential of mountain biking, whether associated with trail development and maintenance or guided mountain biking operations, is considered low. In many instances, guided mountain biking operations are owner-operated by sole practitioners or rely on minimal staff.

Individual guiding ventures would only generate a small number of seasonal (and often multi-task) jobs – for reservations, guiding and interpretation, maintenance and repairs, transportation. Income levels are highly dependent on client willingness to pay and the seasonal nature of the activity. Sole practitioners may retain a portion of profit made or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., building trades for trail development) and reputation (e.g., touring guides). As with revenue potential, employment potential can be enhanced by expanding operations to include winter tourism activities.

Hiring local residents to assist with trail development and maintenance or guided mountain biking operations should not be difficult as there are many local mountain biking enthusiasts. But this will depend on who develops the opportunity and where the staging areas are located. Training will be required to develop the necessary skill sets for guiding and visitor service.

Capital requirements

As indicated in the resource assessment for mountain biking, the trails already developed and mapped in the Central Cariboo provide much of the infrastructure needed for developing commercial mountain biking packages. Additional trails may or may not be required. However, support infrastructure (e.g., directional and interpretive signage, parking, washroom and waste facilities) is needed. Overnight camping facilities may also be needed to accommodate multi-day experiences.

Given the extent of the existing trail systems and the generally small scale of guided hiking operations, minimalinvestment is required to develop the required support infrastructure or to operate guided mountain biking tours. As start-up costs are small, operators have several avenues for financing. However, adequate reserves should be set aside for ongoing trail maintenance and marketing of the guide operations.

Annual rent to BCAL for a license of occupation for mountain biking trails or guided mountain biking tours on extensive areas of Crown land is calculated at $1/client day, with a minimum of $500 per year. Rent for intensive use sites (e.g., overnight campsites for extended mountain biking) which may be within the extensive area is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Economic Assessment Summary

Economic Assessment Summary – Mountain Biking	
Revenue potential based on average expenditures	Low
Employment potential based on nature / number / duration of jobs and income levels	Low
Capital requirements	Low

7.2.5.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Depending on the intended trail system, the compatibility of guided mountain bike trips for tourists with local recreation and community uses is expected to be moderate to high. There is little conflict at present among mountain bikers, hikers and horseback riders using shared trails. However there is potential for such conflict in the future if significant increases in numbers of trail users occur. The increase or introduction of guided mountain bike trips for tourists on trail systems already under other forms of visitor or local recreation use – such as hiking or equestrian trail riding – will result in user conflicts. However, the existing trail systems are extensive and there is the potential for more to be developed. Therefore, separating trail systems by activity use is recommended and this can be done through formal (e.g., tenures) and informal (e.g., signage, word-of-mouth) means. Yet, trails can never be reserved exclusively for tourist use and charging for trail access is unlikely to be accepted by the local community.

Compatibility with Other Economic Uses

Compatibility of mountain biking trail development and guided mountain biking trips for tourists with other economic uses of areas in which trails are located is also expected to be generally moderate to high. However, the opportunity for major conflicts in site specific areas with specific resource based user groups can also be high. Identified mountain biking trails are in Interior Douglas-fir stands, so trail use is generally compatible with single tree selection harvesting systems. Management guidelines will be required for harvesting adjacent to trails. Several general complaints have been received by the Ministry of Forests from range users regarding mountain bike activity disturbing and moving livestock from normal grazing areas.

Community Acceptance / Local Economic Development Support Potential

Mountain biking trail development and guided mountain bike trips for tourists is seen to have strong potential community acceptance and local economic development support. Mountain biking is viewed by the local community as a relatively new sport and certainly one that is growing in popularity. It is also considered compatible with tourism development objectives for the study area. Depending on the nature of the request, economic development support could potentially come from FRBC, CCCTA, TWL, CEAF, CWL-EDC, RDC and CFDC.

Local Skills Availability

Existing capacity and availability of local skills to develop trails and operate and staff guided mountain biking trips for tourists is high. Local expertise exists and is growing with demand. The Williams Lake High School, FRBC and many HRDC programs have trained locals in GPS, mapping and trail development. Training is required however in the area of tour guiding.

Social and Community Assessment Summary – Mountain Biking	
Compatibility with local recreation and community uses	Moderate - High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	High
Local skills availability	High

7.2.5.6 Potential

The Williams Lake area is now becoming known as a mountain biking destination. The topography in the area naturally lends itself to the sport, and local enthusiasts indicate the riding experiences available in the region are among the best in North America. The region's natural attributes and what the local enthusiasts have done to develop the trails give the study area a competitive advantage over other parts of BC.

A positive development is the recent launching of a mountain biking club, which will work to further develop the trails, develop competitive events and promote the sport to locals and visitors. Given the relatively moderate climate of the Williams Lake area, there is also potential to develop winter mountain bike events and tours. The entry of Red's Shreds into the mountain biking tour market will also help to raise the study area's profile as a destination for the activity.

To develop the mountain biking sector, it will be useful to develop guided products, both as stand-alones and as part of multi-activity packages, as well as more events. While mountain biking is a global sport, the majority of participants come from the western United States, especially California and Colorado, and from western Canada. Therefore, it will be important to concentrate marketing efforts on these markets.

Information on the requirements and preferences of these markets should be gathered and disseminated to operators. In addition, it will be important for mountain biking tour operators to receive training in areas such as product development and packaging, marketing, business planning and customer service.

Strategies and mechanisms for maintaining and perhaps expanding the biking trails should also be put in place. Steps should also be taken to manage concerns related to mountain biking including the possibility of conflict with other trail users and stakeholders, such as wildlife observers, hikers and horseback trail riders. These conflicts include safety concerns and social conflicts over the potential for environmental damage and the compatibility of the activity with other recreational pursuits carried out in the same area.

7.2.6 Hiking

Hiking and backpacking are often discussed together, but although both involve travel on foot into wilderness areas they are not synonymous activities. The main difference is that backpacking requires more physical effort than hiking since the backpacker generally carries overnight camping equipment while the hiker usually carries only a lightweight day pack. In addition, although hiking is carried out in both back and front country areas, backpacking is generally a back country activity.

In BC hiking takes place in both front and back country areas. Heli-hiking, which involves the use of helicopters to provide access to hiking areas, has gained significantly in popularity in recent years.

According to a 1995 study by Tourism Canada (the predecessor of the CTC), BC is the most popular area for hiking in Canada (41%) (Tourism Canada).

7.2.6.1 Resource Assessment

There are many hiking opportunities in the Central Cariboo, ranging from front country to backcountry, from short to long, and from easy to advanced difficulty levels. Front country hiking locations include the Williams Lake River Valley Recreation Corridor, the Alex Fraser Research Centre at Knife Creek, the South Side Trails and the Bull Mountain Trails. Backcountry hiking locations include the trails in the South Chilcotin and Taseko Lake Special Resource Development Zones. Parks and protected areas are also popular destinations for hikers, and Churn Creek, Big Creek and the Junction Sheep Range all provide the ideal hiking combination of a wilderness setting and the opportunity to view wildlife. The *Cariboo Chilcotin Adventure Field Guide* trails are also excellent for hiking. These include the Dante's Inferno Trail, De Sous Mountain Trail, Fox Mountain Trail, Meldrum Creek Historical Trail, Ravin Trail, South Side Trails, Spokey Hollow Trail and Ye Olde Boxe Trail. Professional maps have been prepared of a number of the trails mentioned and a map showing many of these trails is attached in **Appendix K**.

Other trails suitable for hiking include heritage trails used for centuries by the Aboriginal peoples, those associated with the Cariboo Gold Rush and settlement of the region, and those developed by the guide outfitters and other tourism operators.

Based on the locational criteria assessment matrix, the Taseko Lake and South Chilcotin sub-zones were assessed to have the best potential for hiking, but other sub-zones are also very suitable for the activity. Comments on the potential of each sub-zone as a location for hiking are as follows:

- Taseko Lake and South Chilcotin scored highly for the proximity of extensive parkland and backcountry, with some existing trails and the potential for more.

- Williams Lake scored highly for existing trails and easy access.
- Grasslands and Beaver Valley also scored high, for existing trails and accessible, relatively undisturbed terrain.
- Palmer and Gaspard scored moderately because of their industrial focus.

Product Frequency

Hiking is quite a popular activity among visitors to the Central Cariboo. According to the tourism operators database, two operators in the Central Cariboo provide hiking tours on a customized basis, one of which can arrange heli-hiking, however neither of these operators market regularly scheduled programs. Hiking is also offered as an activity by eight tourism operators.

Supporting Infrastructure

The trails already developed and mapped in the Central Cariboo provide much of the infrastructure needed for developing commercial hiking packages. However, other infrastructure components such as directional and interpretive signage, washroom facilities and garbage disposal facilities are needed. Overnight camping facilities may also be needed to accommodate multi-day experiences.

Resource Assessment Summary

Resource Assessment Summary – Hiking	
Quantity of associated resource	High
Quality of associated resource	High
Optimal resource units	Taseko Lake, South Chilcotin, Williams Lake
Quality of resource compared to other BC	Moderate
Quantity of resource compared to other BC	Moderate
Product frequency	Moderate
Supporting infrastructure	High

7.2.6.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Government requirements are subject to the specific intentions of the hiking proponent. If the proponent wishes to create or maintain private trails and overnight campsites on Crown land and/or conduct guided hikes on such trails on a commercial basis, then licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Conducting infrequent or otherwise low impact guided hikes on Crown land would only require temporary permits for Short Term Low Impact Use from BCAL. No tenure would be required for one-time low impact guided hikes. If the hikes were to use public trails, then consent would be required from the Ministry of Forests or other agency with responsibility for the trails in question.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

Trail systems on Crown land integral to a destination lodge or fishing lodge facility yet outside of that facility's leasehold area would require a license of occupation by the lodge operator.

Government Policy Assessment Summary

Government Policy Assessment Summary – Hiking	
Tenure / licensing / other requirements	Yes

7.2.6.3 Market Assessment

Market Demand and Characteristics

There are a number of studies that indicate that there is a large hiking market in North America:

- A survey of ecotourists in seven major North American cities found that hiking was a preferred activity for 37% of general interest ecotourists and 60% of experienced ecotourists on their next ecotourism trip (HLA/ARA, 1994)
- Hiking is among the top seven trip activities Canadian domestic travellers took part in on their last long overnight pleasure trip. 32% of travellers took part in hiking, which represents a total market of 5.2 million Canadian travellers (Statistics Canada, 1998).
- Hiking is the second fastest growing land-resource-based activity in the US, with participation growing by 94% to 49 million between 1982-83 and 1994-95. About 558 million hiking trips were taken in 1995 (Cordell, 1998).
- Hiking on gradually changing terrain was the most second popular soft adventure activity among all US adventure travellers in 1997 at 23%, which represents a market of 44.8 million American adults (TIA, 1998).

The Canadian hiking market is comprised equally of males and females and all age groups show high participation in the activity. Hiking is most popular among the under 19 years group (33%). All other categories show good participation rates, with the over 55 years category at 19%, followed closely by the 35 to 44 years (18%), the 45 to 54 years (17%) and 20 to 34 years (13%) categories. (Tourism Canada, 1995).

Hikers in Canada are most likely to travel with friends or as couples. Canadian residents make up more than three quarters of Canada's hiking market, with BC residents comprising almost 40% of the total market. The US and European markets are the most important foreign markets (both at 12%) (Tourism Canada, 1995).

Many Canadian hiking operators offer their clients nature observation (55%), wildlife viewing (34%) and cross-country skiing (32%) as secondary activities. Hiking was also offered as a complementary activities among adventure travel companies offering trail riding (24%), canoeing (18%) and nature observation (16%) as primary activities. Over two-thirds (64%) of hiking operators employ professionally certified guides. The majority of hiking packages sold by Canadian adventure travel operators last longer than one day (89%), with about 60% sold as preset packages with an average length of 6.1 days and an average price of $135 per day (Tourism Canada, 1995).

Similar to Canada, the US hiking market also exhibits gender equality and high participation by all age groups. Baby boomers (35-54 years) have the highest participation rate in hiking at 55%, followed by Generation Xers (18-34 years) at 45% and Matures (55+ years) at 45%. The demographics of US hikers are generally described as follows (TIA, 1998):

- Average age of 38 years
- 51% male/49% female
- 68% married/ 25% single
- 57% have children at home
- Median household income of US$46,100
- 45% college graduates

Residents of the Northeastern US are most likely to participate in hiking (56%), but it is also popular among Westerners (54%), Midwesterners (53%) and Southerners (42%). US hikers spent an average of US$850 on their last soft adventure trip (TIA, 1998).

Many of both the non-resident and resident visitors to BC participate in hiking, as is indicated by the results of the 1998 *BC Visitor Study*. Based on the visitor participation rates reported in this study, as shown in **Figure 7.6**, it is estimated that about 20% or more of the visitors from all source markets visitors particpate in hiking/backpacking on their overnight trip in BC. This translates into a potential hiking market of more than 5 million adults.

Figure 7.6: Potential Hiking/Backpacking Market for BC

	Number of Overnight Visitors	Participation in Hiking/Backpacking	Number of Hiking/Backpacking Visitors
BC Residents	10,762,000	26%	2,798,120
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	27%	933,120
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	20%	486,200
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	19%	317,870
Long Haul Canada (Rest of Canada)	1,146,000	20%	229,200
Asia/Pacific	797,000	24%	191,280
Europe	508,000	26%	132,080
Total Size of the Potential Hiking/Backpacking Market			**5,087,870**

Source: Tourism British Columbia, 1998; ARA calculations

Seasonality

For the most part, hiking is a summer months activity. Hiking experiences could also be arranged in the spring and fall months, but the market for such excursions would likely be limited.

Travel Trade Input

The travel trade representatives indicated that BC residents would be the most likely to travel to the area for hiking experiences. Visitors from other regions would be likely to make the trip specifically for hiking only if a high profile themed route, similar to the West Coast Trail, were developed. Even then, it would have only niche market appeal.

Market Assessment Summary

Market Assessment Summary – Hiking	
Appeal to existing tourism markets	Moderate
Market growth trends	High
Origin of potential visitors	BC, North America
Compatibility with other products	High
Seasonality	Low

7.2.6.4 Economic Assessment

Revenue potential

Sources of revenue include trail fees and fees for guiding operations. Trail fees are not generally high while pricing levels for guided hiking can vary depending on duration, level of service, package inclusions, reputation of the guide or trail. As the number of hikers permitted on trails with fees can be restricted so as to minimize impacts on trails and visitor experience, the revenue generation potential of trails can also be restricted. Also, there will be local resistance to imposing fees for trail use, raising equity issues if tourists are charged. Revenue generated by guided hiking operators can be further limited by group size constraints (again for trail and visitor experience impact minimization) and seasonal weather and visitation patterns. As a result, hiking as an ecotourism activity in the study area can expect to achieve only low to moderate levels of operating revenue. This can be supplemented by expanding trail use and guiding operations to include trail-based winter tourism activities (see **Section 7.2.10**).

Businesses in the study area can also benefit by selling supplies and services to the hiking enthusiast, hiking trail builder or guide, providing transport to the trails and the like.

Employment potential

The employment potential of hiking, whether associated with trail development and maintenance or guided hiking operations, is considered low to moderate. In many instances, guided hiking operations are owner-operated by sole practitioners or rely on minimal staff.

Individual ventures would only generate a small number of seasonal (and often multi-task) jobs – for reservations, guiding and interpretation, maintenance and repairs, transportation. Income levels are highly dependent on client willingness to pay and the other factors cited above for revenue potential.

Sole practitioners may retain a portion of profit or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., building trades) and reputation (e.g., guides). As with revenue potential, employment potential can be enhanced by expanding operations to include winter tourism activities.

Hiring local residents to assist with trail development and maintenance or guided hiking operations should not be difficult as there are many local hiking enthusiasts. However, training will be required to develop the necessary skill sets for guiding and interpretation.

Capital requirements

As indicated in the resource assessment for hiking, the trails already developed and mapped in the Central Cariboo provide much of the infrastructure needed for developing commercial hiking packages. Additional trails may or may not be required. However, support infrastructure (e.g., directional and interpretive signage, parking, washroom and waste facilities) is needed. Overnight camping facilities may also be needed to accommodate multi-day experiences.

Given the extent of the existing trail systems and the generally small scale of guided hiking operations, minimal investment is required to develop the required support infrastructure or to operate guided hiking tours. However, adequate reserves should be set aside for ongoing trail maintenance and marketing of the guide operations.

Annual rent to BCAL for a license of occupation for hiking trails or guided hikes on extensive areas of Crown land is calculated at $1/client day, with a minimum of $500 per year. Rent for intensive use sites (e.g., overnight campsites for extended hiking) which may be within the extensive area is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Economic Assessment Summary

Economic Assessment Summary – Hiking	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low

7.2.6.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee (LAC) for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Hiking trails are accepted and encouraged within the Williams Lake area. Depending on the intended trail system, the compatibility of guided hikes for tourists with local recreation and community uses is expected to be moderate to high. The increase or introduction of guided hikes for tourists on trail systems already under other forms of visitor or local recreation use – such as mountain biking or equestrian trail riding – will result in user conflicts. However, the existing trail systems are extensive and there is the potential for more to be developed. Therefore, separating trail systems by use is recommended and this can be done through formal (e.g., tenures) and informal (e.g., signage, word-of-mouth) means. Yet, trails can never be reserved exclusively for tourist use and charging for trail access is unlikely to be accepted by the local community.

Compatibility with Other Economic Uses

Compatibility of hiking trails and guided hikes for tourists with other economic uses of areas in which the trails are located is also expected to be generally moderate to high, subject to location. However, the opportunity for major conflicts in site specific areas with specific user groups – particularly resource based sectors – is also high. To minimize the potential for conflict, trails in areas with existing or planned logging or mining activity should be avoided. Operators and their clientele will have to have realistic expectations with regard to widespread range use as this is a traditional use that occurs throughout the study area. As the visual and noise quality of the area in which the hiking trail system is located is important, it is preferable to use or develop such systems in areas already under visual and noise management (e.g., Parks, SRDZs, scenic areas).

Community Acceptance / Local Economic Development Support Potential

Hiking trail development and guided hikes on trails for tourists is seen to have moderate to strong potential community acceptance and local economic development support. However, this would have to be reviewed on a site-specific basis to evaluate potential conflicts. Such activity is considered compatible with tourism development objectives for the study area and local residents are proud of their existing hiking trail systems. Economic development support could potentially come from FRBC, CCCTA, TWL, CWL-EDC, CEAF, RDC and CFDC.

Local Skills Availability

Existing capacity and availability of local skills to develop hiking trails or operate and staff guided hikes on trails is high. The Williams Lake High School, FRBC and many HRDC programs have trained locals in GPS, mapping and trail development. Training is required however in the area of tour guiding.

Social and Community Assessment Summary – Hiking	
Compatibility with local recreation and community uses	Moderate – High
Compatibility with other economic uses	Moderate – High
Community acceptance / local economic development support potential	Moderate - High
Local skills availability	High

7.2.6.6 Potential

With its many trails, varied terrain, high scenic values, and opportunities enroute to view wildlife and study natural history, western history and culture and Aboriginal history and culture, the Central Cariboo has the potential to become a popular destination for hikers.

As discussed in the section on horseback trail riding (see **Section 7.6**), considerable work has been done on the development of a regional trail network or series of networks in the region that would be suitable for a variety of recreational use. The further development of such a network would be beneficial for developing the hiking sector. Other trail system expansion opportunities include the extension of the front country Williams Lake River Valley Trail from Scout Island to the Fraser River, which would provide opportunities to develop combined water-based recreation and hiking experiences. There is also the potential to re-create the Fraser River pack horse trails that once stretched from Lillooet to Soda Creek, which could include the creation of a linear park. These trail systems open the door for potential hiking guide operators.

To be successful in attracting segments other than just the provincial hiking enthusiast, the development of a unique theme or themes with a strong interpretive component for the hiking trails will be necessary. Themed hiking experiences and guide operations could revolve around the study area's gold rush heritage, its Aboriginal heritage and culture, its western heritage and culture, or the history, geology and ecology of the region or individual natural attractions, such as the Fraser River or Chilcotin River. Given the variety of hiking trails already developed in the Central Cariboo this potential does exist.

The development of themed trails requires that the tourism industry develops methods to ensure that the trails are well-maintained. In addition, the trails will have to be well-mapped and have good directional and interpretive signage. To facilitate overnight tours, campsites, or trail huts must be available and a reservation system may be required. Operator training in key areas, including trail stewardship, product development, marketing, interpretation and customer service should be provided. In addition, an effective marketing and promotion plan will also be key to the success of the hiking sector.

7.2.7 Nature Observation

Nature observation includes viewing of wildlife and natural features. In general, there are two forms of bird watching and wildlife viewing. Primary wildlife viewing occurs when travellers take special trips to watch, study or photograph wildlife. Meanwhile, secondary wildlife viewing occurs when travellers incidentally see wildlife while on trips whose primary purposes are other than wildlife viewing. These two categories also apply to the viewing of natural features.

Canada is a popular destination for viewing of birds and other wildlife and natural features. Consequently, there are a relatively large number of operators who either specialize in this activity or offer it as a key secondary activity.

Recent studies on wildlife viewing suggest that BC has a competitive edge in this area, mainly because it has the most biologically diverse bird and animal life in Canada. In surveying adventure tourism operators, Tourism Canada found that BC is the most popular province among visitors for viewing nature (20%) (Tourism Canada, 1995). Meanwhile, Statistics Canada reported that in 1998 BC was ranked by domestic travellers as the number one bird and wildlife viewing destination on a per capita basis (Smith, 2000).

Better known wildlife viewing / natural features activities in BC include whale watching off Vancouver Island, grizzly bear watching in the Khutzeymateen Valley, eagle observation near Brackendale, viewing the Fraser Canyon near Lillooet, visiting glaciers, and watching the salmon spawn in various rivers, such as the Fraser and Adams Rivers.

Wildlife viewing can generate significant revenues for rural communities in BC. For example, the 3,000 participants in Parksville/Qualicum Beach's three day Brant Wildlife contributed $420,000 in revenues to the two communities in each of 1993 and 1994 (Watchable Wildlife, 1999-2000).

7.2.7.1 Resource Assessment

Available Resources

The Central Cariboo has abundant viewing species, ranging from large and small mammals to diverse bird species. The area has some unique species, such as Big Horn Sheep and the endangered American White Pelican, as well as unique annual events, such as the spawning of salmon in the Fraser River.

There are several locations that have interpretive components and viewing structures can be accessed by motor vehicle, including the Reidemann Wildlife Sanctuary, the Scout Island Nature Reserve, the Cariboo Educational Woodlot, Junction Sheep Range Provincial Park and McLeese Lake/Sheridan Creek. The significant natural features found in the region, such as Dante's Inferno Lake, Farwell Canyon and the Fraser and Chilcotin Rivers, also provide excellent nature observation opportunities, including providing spectacular backdrops for viewing wildlife species. Many of these sites also have trails that facilitate nature observation.

Prime locations for wildlife viewing and species that can be seen are as follows:

- Alkali Lake – Reidemann Wildlife Sanctuary – migrating waterfowl, American White Pelican, Long-billed Curlew, Trumpeter Swan, Tundra Swan
- Becher's Pond – bluebirds
- Cariboo Educational Woodlot (Bull Mountain) – Moose, Mule Deer
- Junction Sheep Range Provincial Park – California Bighorn Sheep, Long-billed Curlew, Grouse
- McLeese Lake/Sheridan Creek – spawning Kokanee salmon
- Scout Island Nature Centre – Red Fox, Muskrat, River Otter, Beaver, Milbert's Tortoiseshell Butterfly, Great Blue Heron, waterfowl
- Williams Lake River Valley – Mule Deer, Black Bear, Bobcat, Moose, Red Fox, Muskrat, Mink, River Otter, Beaver, Milbert's Tortoiseshell Butterfly, Great Blue Heron, waterfowl, pygmy owl, goshawk

Based on the locational criteria assessment matrix, the Taseko Lake and South Chilcotin sub-zones were determined to have the best potential for nature observation tourism development (see **Appendix J2**). However, all of the other sub-zones also have good potential. Comments on the potential of each sub-zone as a location for nature observation are as follows:

- Taseko Lake and South Chilcotin scored highly for proximity to parkland and undisturbed landscapes.

- Williams Lake scored quite highly for unique scenic views and attractions and easy access. Grasslands scored quite high because of unique wildlife and protected areas.
- Other sub-zones scored moderately, as wildlife may be encountered throughout the study area.

Product Frequency

According to the tourism operators database, two operators offer nature tours, which could include nature observation components. As a visitor activity, bird watching is offered by two operators and wildlife viewing is offered by nine operators.

Supporting Infrastructure

Nature observation infrastructure includes roads or trails to access the viewing sites, viewing structures and interpretive signage and displays. These are generally in place in many of the prime viewing locations in the Central Cariboo, however viewing structures and interpretive components are still needed in some areas.

Resource Assessment Summary

Resource Assessment Summary – Nature Observation	
Quantity of associated resource	Moderate
Quality of associated resource	Moderate
Optimal resource units	Taseko Lake, South Chilcotin
Quality of resource compared to other BC	Moderate
Quantity of resource compared to other BC	Moderate
Product frequency	Moderate
Supporting infrastructure	High

7.2.7.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Government requirements are subject to the specific intentions of the nature observation proponent. If the proponent wishes to create or maintain private trails, observation structures (e.g., hides) and overnight campsites on Crown land and/or conduct guided wildlife viewing tours using such trails and viewing facilities on a commercial basis, then licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Conducting infrequent or otherwise low impact guided wildlife viewing tours on Crown land would only require temporary permits for Short Term Low Impact Use from BCAL. No tenure would be required for one-time low impact guided wildlife viewing tours. If the guided wildlife viewing tours were to use public trails or campsites, then agreements for their use and maintenance would be required from the Ministry of Forests or other agency with responsibility for the facilities in question. Conducting commercial wildlife viewing tours within provincial parks would require park use permits. Use of public roads by commercial nature observation tour operators using vehicles would not require prior approvals.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

Trail systems and nature observation structures integral to a destination lodge that are proposed for Crown land yet outside of that facility's leasehold area would require a license of occupation by the lodge operator.

Government Policy Assessment Summary

Government Policy Assessment Summary – Nature Observation	
Tenure / licensing / other requirements	Yes

7.2.7.3 Market Assessment

Market Demand and Characteristics

Based on analysis conducted on the Canadian Travel Survey (CTS), Statistics Canada estimates that 3.1 million Canadians participated in bird and wildlife viewing activities in Canada in 1998, with about 50% (1.5 million) of these being travellers. Of the viewers who travelled, 16% (496,000) chose British Columbia as their destination, and nearly 70% of BC viewers took their trips in their home province. The demographics and characteristics of Canadian bird and wildlife viewers are (Smith, 2000):

- About one third (32%) are baby boomers (35-54 years), 19% are 20-34 years and 16% are 55+ years
- About 50% are married or live common law
- 61% have post-secondary certificates/diplomas or university degrees
- 46% earn more than $40,000 per year, and 25% earn more than $60,000
- 58% travelled with their children, rising to 64% for viewers visiting Western Canada
- 41% of all viewers used camping for their main accommodation, rising to 48% for those visiting Western Canada
- 71% of overnight trips were taken between July and September
- all participate in other outdoor activities: 88% go walking, 64% swimming and 50% sightseeing
- Of viewers visiting Western Canada, 74% went sightseeing on their trip, 47% visited a national or provincial park, and 24% visited historic sites

The majority of nature observation packages sold by Canadian adventure travel operators last longer than one day (59%), with about 57% sold as preset packages with an average length of 5.3 days and an average price of $172 per day. Meanwhile, wildlife watching packages range from about $111 to $337 per day, depending on the species being interpreted (Tourism Canada, 1995).

Bird watching is the fastest growing land-resource-based activity in the US, with participation growing by 155% to 54 million between 1982-83 and 1994-95. Moreover, by 2050 participation in non-consumptive wildlife activities, including bird watching, photography and other forms of wildlife viewing is expected to increase by 61% to 1.61 million participants (Cordell, 1998).

When it comes to tourism, bird and animal watching was the fourth most popular soft adventure activity among all US adventure travellers in 1997 at 12%, representing 24 million adults. Mature adults (55+ years) are the most likely to participate in this activity (40%), followed by baby boomers (35-54 years) at 27% and Gen-Xers (18-34 years) at 23%. The demographics of American bird/animal watchers are (TIA, 1998):

- Average age of 41 years
- 45% male/55% female
- 67% married/25% single
- 50% have children at home
- Median household income of US$44,600
- 49% college graduates

Residents of the Midwest are most likely to participate in bird/animal watching (34%), followed by Westerners (34%) and Northeasterners (28%). Other top favourite soft adventure activities for US hikers are camping (75%), hiking (70%) and biking (38%), while their favourite hard activities are rafting (17%), snorkelling / scuba diving (16%) and backpacking (14%). US bird/animal watchers spent an average of US$1,025 on their last soft adventure trip (TIA, 1998).

Bird and wildlife watching is a very popular activity for both residents and non-residents, especially Europeans, travelling in BC. Based on the visitor participation rates reported in the 1998 *BC Visitor Study*, shown in **Figure 7.7**, the estimated size of the potential wildlife viewing market is about 7.5 million visitors.

Figure 7.7: Potential Bird/Wildlife Watching Market for BC

	Number of Overnight Visitors	Participation in Wildlife Viewing/ Bird Watching	Number of Wildlife Viewing/Bird Watching Visitors
BC Residents	10,762,000	33%	3,551,460
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	42%	1,451,520
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	37%	899,470
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	44%	736,120
Long Haul Canada (Rest of Canada)	1,146,000	26%	297,960
Asia/Pacific	797,000	38%	302,860
Europe	508,000	50%	254,000
Total Size of the Potential Wildlife Viewing Market			**7,493,390**

Source: Tourism British Columbia, 1998; ARA calculations

Travel Trade Input

The travel trade interviews indicated that the ecotourism markets are very interested in wildlife viewing and bird watching, but that the Central Cariboo may find it difficult to compete with other areas that offer more reliable wildlife viewing, such as the whale, grizzly and eagle watching available in a number of coastal areas. The representatives stressed that the interpretive aspects of tours are essential and must be delivered well. Those firms catering to seniors also indicated that their clients are very interested in nature observation, but that the viewing sites must be easily accessible in terms of physical effort

Seasonality

The majority of nature observation occurs during the summer months in BC, although the spring and fall seasons may provide some excellent opportunities, such as the viewing of fall colours, salmon spawning and eagles.

Market Assessment Summary

Market Assessment Summary – Nature Observation	
Appeal to existing tourism markets	High
Market growth trends	High
Origin of potential visitors	BC, North America, International
Compatibility with other products	High
Seasonality	Low

7.2.7.4 Economic Assessment

Revenue potential

Sources of revenue include trail or viewing facility fees for self-guided visits and fees for guided nature observation excursions. Trail fees are not generally high while pricing levels for guided nature observation can vary depending on trip duration and mode, level of service, package inclusions (e.g., accommodation), reputation of the guide and type of nature to be observed (e.g., rarity, status as endangered, etc.). As the number of nature observers permitted on trails with fees can be restricted so as to minimize impacts on trails and enhance visitor experience, the revenue generation potential of trails can also be restricted as a result. Also, there will be local resistance to imposing fees for trail use, raising equity issues if tourists are charged. Revenue generated by guided nature observation operators can be further limited by group size constraints (again for trail and visitor experience enhancement as well as by vehicle capacities if motorized transport is provided) and seasonal weather, animal sighting and tourist visitation patterns.

As a result, nature observation operations as an ecotourism activity in the study area can expect to achieve only low to moderate levels of operating revenue. This can be supplemented by expanding trail (and vehicle, if applicable) use and guided nature observation operations to include other summer and winter trail- and vehicle-based tourism activities such as hiking, mountain biking, horseback trail riding, cross-country skiing, snow shoeing and dog sledding (see **Sections 7.2.4, 7.2.5, 7.2.6, and 7.2.8**).

Businesses in the study area can also benefit by selling supplies and services to the nature observation enthusiast, trail builder or guide operator, as well as providing independent transport to the trailheads and the like.

Employment potential

The employment potential of nature observation operations, whether associated with trail and viewing infrastructure development and maintenance or guided nature observation operations, is also considered low to moderate. In many instances, guided nature observation operations are owner-operated by sole practitioners or rely on minimal staff.

Individual ventures would only generate a small number of seasonal (and often multi-task) jobs – for reservations, guiding and interpretation, transportation. Income levels are highly dependent on client willingness to pay and the other factors cited above for revenue potential. Sole practitioners may retain a portion of profit earned or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., building trades) and reputation (e.g., guides). As with revenue potential, employment potential can be enhanced by expanding operations to include other summer and winter tourism activities.

Hiring local residents to assist with trail and viewing facility development and maintenance or guided nature observation operations should not be difficult as there are many local nature observation enthusiasts. However, training will be required to develop the necessary skill sets for guiding, interpretation and visitor services.

Capital requirements

As indicated in the resource assessment for nature observation tourism, infrastructure required for developing commercial guided nature observation operations – including roads or trails to access the viewing sites, viewing structures and interpretive signage and displays – are generally in place in many of the prime viewing locations in the Central Cariboo. However interpretive components and staging areas (e.g., parking) are still needed in some areas. Overnight camping facilities may also be needed to accommodate multi-day experiences and vehicles would be needed for guided nature observation excursions conducted along roadways.

Given the extent and standard of the existing road and trail systems, the need for viewing and interpretive facilities, the possible need for vehicles and the generally small scale of guided nature observation operations, anywhere from low to moderate levels of investment would be required to develop the required support infrastructure and to operate guided nature observation excursions. Capital requirements could be minimized by seeking transportation services and accommodation facilities from other suppliers. However, adequate reserves should also be set aside for ongoing trail, facility (and vehicle) maintenance and marketing of the guide operations. Financing such a venture through lending institutions could be difficult as tenable assets would be limited.

Annual rent to BCAL for a license of occupation for nature observation trails and viewing facilities or guided nature observation operations on extensive areas of Crown land is calculated at $1/client day, with a minimum of $500 per year. Rent for intensive use sites (e.g., overnight campsites for extended excursions) which may be within the extensive area is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Economic Assessment Summary

Economic Assessment Summary – Nature Observation	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - Moderate

7.2.7.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Assuming that nature observation would primarily involve non-motorized viewing or that vehicular-use would be limited to established roadways, no conflicts with local recreation activities are anticipated and compatibility is expected to be high. Depending on the areas intended to be accessed, there is potential for conflict with other recreation uses – such as hunting and mountain biking.

Compatibility with Other Economic Uses

Compatibility of nature observation with other economic uses of areas accessed is expected to be generally moderate to high, subject to location and coexistence of resource based activities. To minimize the potential for conflict, areas with existing or planned logging, mining or other activity which creates excessive noise or modifies habitat should be avoided by guided nature observation operations. It may be preferable to use areas already under visual, noise and habitat protection management (e.g., Parks, SRDZs, scenic areas).

Community Acceptance / Local Economic Development Support Potential

Nature observation is seen to have moderate to strong potential community acceptance and local economic development support. Such activity is considered compatible with most tourism development objectives for the study area. Depending on the nature of the request, economic development support could potentially come from TWL, CCCTA, CWL-EDC, CEAF, FRBC, RDC and CFDC.

Local Skills Availability

Existing capacity and availability of local skills to develop nature observation facilities and operate and staff guided nature observation tours is considered moderate. The Williams Lake High School, FRBC and many HRDC programs have trained locals in GPS, mapping and trail development. Training is required however in the area of tour guiding.

Social and Community Assessment Summary – Nature Observation	
Compatibility with local recreation and community uses	High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	Moderate – High
Local skills availability	Moderate

7.2.7.6 Potential

Critical resource attributes for nature observation include the presence of wildlife and natural features and ability to access viewing sites. The Williams Lake area scores quite well in these areas.

Nature observation experiences that could be developed range from self-guided experiences on trails and specially constructed viewing platforms to multi-day commercial guided tours. Guided experiences should include professional interpretive services such as guides and printed materials. These interpretive services should focus on the ecology and geography as well as the bird and animal life of the particular region. Nature observation is also very compatible as either a primary or secondary activity with other ecotourism activities, especially horseback riding, hiking and mountain biking. Other opportunities for nature observation programs include developing workshops and educational tours for school groups and special interest groups. Tours could also focus on wildlife photography tours, including instruction on the skills and techniques of good nature photography.

To facilitate the development of nature observation tourism, a variety of interpretive techniques should be developed in optimal locations. These include things such as placing a series of interpretive signs along a trail, information shelters containing interpretive signs and displays, audio-video presentations that visitors can borrow or buy and interpretive publications, including self-guided tour brochures. In addition, nature observation tour operators should receive interpretive and customer service training, as well as product development and packaging, business management and marketing training.

7.2.8 Winter Tourism

Winter tourism activities are an important component of the Canadian tourism industry since these activities occur in the off-season. This section focuses on non-downhill skiing, non-motorized winter tourism activities having potential for development in the Central Cariboo. The two main winter tourism products are nordic skiing and dogsledding, but other winter tourism activities that could be offered include snowshoeing and sleigh rides.

Nordic Skiing

There are two forms of nordic skiing, each of which require different techniques and equipment and take place in different locations. Cross-country skiing uses a slide glide technique, usually takes place on groomed trails. It is generally a single day activity, and appeals to skiers of all ability levels. Ski touring takes place in backcountry areas and generally involves the breaking of new trails by the skiers. Ski touring excursions can last one day, be multi-day experiences where the skiers stay at a base camp, go from hut to hut or camp in different locations each night. Ski touring is suited for more experienced, physically fit skiers.

The ski/snowboard product, which includes nordic skiing, has always been one of Canada's leading winter tourism products. Recent reports from the CTC indicate that this is still the case, with cross-country skiing growing in popularity as part of the overall trends towards fitness and relaxation (Kingsmill, October 2000).

Two CTC ski product clubs have emerged in recent years: the Canadian Cross-Country Ski Product Club is centered in Hull, Quebec and its primary goal is to assist the industry to become more "Market Ready" through a variety of training programs; and, the Ski & Snowboard Industry Club's goal is to assist in the marketing of mountain resort experiences.

Dogsledding

In dogsledding, a team of harnessed dogs, most often Huskies or Malamuts, pulls a sled or toboggan designed to carry passengers and supplies. The dogs are guided by a "musher" or dog handler.

Commercial operations have existed in Canada for a number of years, with a 1995 CTC survey identifying 19 operators who derived most of their income from dogsledding, most in Quebec (9) and the Yukon (5) (CTC, 1998). Dogsledding excursions range from short one or two hour experiences to multi-day "extreme" adventures to remote destinations. The image of dogsledding is now used increasingly in the branding of Canada's winter wilderness image, and the activity is now said to be an "icon of the Canadian North" (Taylor, November 2000).

7.2.8.1 Resource Assessment

Available Resources

The only location in the Central Cariboo offering tracked cross-country skiing is the trail system at Bull Mountain. This area has been developed with assistance from the provincial government by the local cross-country ski club, which has seen its membership grow at an annual rate of about 30% over the last three years. It contains about 25 km of trails, with 3.5 km of lit trails for night skiing. Currently, work is underway to improve the facilities for the 2002 Winter Games, including developing trails for ski-racing and improvements to the parking and staging areas. The ski club also stages the annual Bull Mountain Challenge, which draws mainly local residents. Its future development plans include the addition of a lodge facility.

Owing to the limited number and amount of back country areas in the Central Cariboo, locations for back country skiing are quite limited. This limitation together with the unreliable snow conditions in the study area mean that there is no potential to develop hut-to-hut ski touring product.

In the case of snowshoeing, snow depth and quality is less of a concern and since snowshoes are highly manoeuvrable, the activity can be carried out in any area, particularly scenic ones, where there is sufficient snow. The same is true for dogsledding and sleigh rides.

Based on the locational criteria assessment, the Williams Lake sub-zone was determined to have the best potential for winter tourism activities (see **Appendix J2**). Comments on the potential of the study area's sub-zones for western theme tourism are as follows:

- Williams Lake is the highest scorer, and it clearly holds the greatest variety of easily accessible, year-round activities and facilities.
- Other high scores in Taseko Lake, South Chilcotin, Beaver Valley and Grasslands reflect the diverse activities and scenic beauty of winter in these sub-zones.

- Lower scores in the Gaspard and Palmer sub-zones reflect fairly uniform or undesirable conditions which limit the variety of available winter activities.

Product Frequency

According to the tourism operators database, there is one operator that offers guided cross-country or ski touring experiences, including heli-skiing, but only on a customized basis. Although this operator is based in Williams Lake, these experiences are generally carried out in areas neighbouring the study area. There are four operators that offer cross-country skiing as a self-guided activity. Although there are no operators located in the Central Cariboo that offer dog sledding, there is an operator in the 100 Mile House area that could be contracted to provide dogsledding experiences.

Supporting Infrastructure

The infrastructure required for cross-country skiing, including trails and parking areas, is already in place at the Bull Mountain Trails. Ski touring does not necessarily require groomed trails. The other winter activities also do not require any specific infrastructure.

Resource Assessment Summary

Resource Assessment Summary – Winter Tourism	
Quantity of associated resource	Low – Moderate
Quality of associated resource	Moderate
Optimal resource units	Williams Lake, Taseko Lake, South Chilcotin, Beaver Valley
Quality of resource compared to other BC	Low - Moderate
Quantity of resource compared to other BC	Low - Moderate
Product frequency	Low
Supporting infrastructure	High

7.2.8.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Government requirements are subject to the specific intentions of the proponent wishing to introduce winter activities. If the proponent wishes to create or maintain private trails, a base camp and/or a series of overnight campsites (huts have not been assumed given their relative higher costs and the unpredictable snow conditions) at numerous locations on Crown land and/or conduct guided excursions using such facilities for cross-country skiing, ski touring, snowshoeing or dogsledding on a commercial basis, then a license of occupation for Long Term Use of an Extensive Area would be required from BCAL. Site development and any trail development could all be incorporated under a single tenure.

Conducting infrequent or otherwise low impact cross-country, dogsledding, snowshoeing and sleigh ride excursions on Crown land would only require temporary permits for Short Term Low Impact Use from BCAL. This is also the case for one time ski touring excursions in which overnight stays would not be involved. No tenure would be required for one-time low impact guided excursions. If the cross-country skiing, dogsledding or snowshoeing excursions were to use public trails, then consent would be required from the Ministry of Forests or other agency with responsibility for the trails in question.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

If a non-profit organization (e.g., a ski club) were to undertake this type of development opportunity, a co-management agreement should be entered into between that entity and the Ministry of Forests.

Trail systems on Crown land that are integral to a destination lodge or other major tourism / recreation development facility yet outside of that facility's leasehold area would require a license of occupation by the operator of that leasehold if their guests were to access such trails on a guided or independent basis.

Government Policy Assessment Summary

Government Policy Assessment Summary – Winter Tourism	
Tenure / licensing / other requirements	Yes

7.2.8.3 Market Assessment

Market Demand and Characteristics

Nordic Skiing

According to the Canadian Ski Council, 8% of Canadians over the age of 12 cross-country ski, representing a market of almost 2 million participants. Of these, 47% are active cross-country skiers who ski three or more times per month (Canadian Ski Council, October 2000). The Canadian alpine/Nordic ski sector is growing, with an average annual compound rate of 4% estimated between 1984/85 and 1993/94 (CWSAA, no date).

The market for Canadian ski experiences is comprised of more females (54%) than males, with most participation by those under 44 years of age. Highest is the 20 to 34 years category (28%), followed by the 19 years (25%) and 35 to 44 years (24%) groups (Tourism Canada, 1995).

Cross-country skiers travelling in Canada are most likely to travel as families (38%) or with friends (27%) or as couples (23%). Canadian residents make up about 80% of Canada's cross-country ski market, with Ontario residents comprising almost 50% of the total market. The US is the only foreign market with a significant market share (15%) (Tourism Canada, 1995).

Many Canadian cross-country skiing operators offer their clients nature observation (47%) or bird watching (42%) as secondary activities. Cross-country was also offered as a complementary activity among adventure travel companies offering trail riding (20%), snowmobiling (17%) and canoeing (16%) as primary activities. Most (84%) cross-country skiing operators employ professionally certified guides/tour leaders. The majority of cross-country skiing packages sold by Canadian adventure travel operators last longer than one day (74%), with 55% sold as preset packages with an average length of 4.5 days and an average price of $110 per day (Tourism Canada, 1995).

Cross-country skiing and ski touring are gaining in popularity in the US, with participation growing by 22.5% to 6.5 million adults between 1982-83 and 1994-95. Of these, 5.7 million cross-country ski on ungroomed trails and 5.4 million on groomed trails while 3.7 million participate in ski touring (Cordell, 1999).

Dogsledding

Dogsledding tends to be more popular among females (60%+) than males (Canadian Tourism, 1998; Taylor, October 2000). Age demographics range from children to seniors (Taylor, October 2000), with highest participation in the 20 to 34 years (39%), 35 to 44 years (26%) and 45 to 54 years (20%) groups (Tourism Canada, 1995).

About one in four dogsledding visitors to Canada travel as couples and a significant proportion (27%) travel solo. Non-residents comprise over 80% of Canada's dogsledding market, with most visitors coming from Japan (41%), France (25%), the US (8%) and Germany (7%). The Ontario market is the only domestic market with a significant market share (9%) (Tourism Canada, 1995).

Dogsledding is offered as a primary activity by 19 Canadian tourism operators. It is also offered as a secondary activity by most operations primarily involved in snowmobiling (79%). Many dogsledding operators (47%) use professionally certified guides/tour leaders. Most packages last longer than one day (84%), with 53% sold as preset packages with an average length of 6 days and an average price of $190 per day (Tourism Canada, 1995).

BC Winter Activities Market

Based on the participation rates in winter activities of resident and non-resident visitors to BC in 1995/96, as shown in **Figure 7.8** the potential market for BC winter tourism experiences is estimated at about 1.7 million adults. The markets with the most potential are Asia/Pacific, Europe and Regional Canada.

Figure 7.8: Potential Winter Activities Market for BC

	Number of Overnight Visitors	Participation in Winter Activities (net)	Number of Winter Activities Visitors
BC Residents	10,762,000	5%	538,100
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	13%	449,280
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	7%	170,170
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	5%	83,650
Long Haul Canada (Rest of Canada)	1,146,000	7%	80,220
Asia/Pacific	797,000	34%	270,980
Europe	508,000	25%	127,000
Total Size of the Potential Winter Activities Market			**1,719,400**

Source: Tourism British Columbia, 1998; ARA calculations

Travel Trade Input

The travel trade interviews addressed snowmobiling and cross-country skiing only and not other forms of winter tourism, however they do provide insight into the market for the types of winter activities covered in this section. The travel trade representatives indicated that the market for winter tourism experiences in Western Canada is mainly regional. They also indicated that it would be difficult for the Central Cariboo to attract many visitors for winter tourism experiences because other competing destinations such as Whistler and the 100 Mile House area have better conditions and high profiles. However, they indicated that there is potential for developing more winter tourism in the study area if a destination lodge were developed that offered multi-activity winter packages. In addition, developing more winter events would help to increase visitation by local residents and their friends and families.

Seasonality

Naturally, winter tourism activities will be confined to the winter months.

Market Assessment Summary

Market Assessment Summary – Winter Tourism	
Appeal to existing tourism markets	Low - Moderate
Market growth trends	Moderate
Origin of potential visitors	BC, North America
Compatibility with other products	Low
Seasonality	Low

7.2.8.4 Economic Assessment

Revenue potential

Sources of revenue include trail fees and fees for guiding operations. Trail fees are not generally high (depending on infrastructure and maintenance requirements such as lighting for evening use) while pricing levels for guided winter activities can vary depending on duration, level of service, package inclusions, reputation of the guide or trail system. As the number of winter activity participants permitted on trails with fees can be restricted so as to minimize impacts on trails and visitor experience, the overall revenue generation potential of trails can also thereby be restricted. Also, depending on investment in capital infrastructure there will be local resistance to imposing fees for trail use, raising equity issues if tourists are charged. Revenue generated by guided winter activity operators can be further limited by group size constraints (again for trail and visitor experience impact minimization) and seasonal weather, snow conditions and visitation patterns.

As a result, ecotourism enterprises offering winter activities in the study area can expect to achieve only low to moderate levels of operating revenue. This can be supplemented by expanding trail use and guiding operations to include trail-based non-winter tourism activities such as hiking, horseback trail riding, mountain biking, and nature observation (see **Sections 7.2.4, 7.2.5, 7.2.6 and 7.2.7**).

Businesses in the study area can also benefit by selling supplies and services to the winter activity enthusiast, trail builder or guide, providing transport to the trails and the like.

Employment potential

As with revenue potential, the employment potential of winter tourism activity-based operations, whether associated with trail development and maintenance or guiding operations, is also considered low to moderate. In many instances, guiding operations are owner-operated by sole practitioners or rely on minimal staff.

Individual ventures would only generate a small number of seasonal (and often multi-task) jobs – for reservations, guiding and interpretation, maintenance and repairs, transportation. Income levels are highly dependent on client willingness to pay and the other factors cited above for revenue potential. Sole practitioners may retain a portion of profit or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills (e.g., building trades) and reputation (e.g., guides). As with revenue potential, employment potential can be enhanced by expanding operations to include non-winter trail-based tourism activities.

Hiring local residents to assist with trail development and maintenance or guiding operations for winter activities should not be difficult as there are many local enthusiasts and clubs. However, training will be required to develop the necessary skill sets for guiding, interpretation and visitor services.

Capital requirements

Capital requirements for development and operation of winter tourism facilities and activities are expected to be low to moderate. As noted in the resource assessment, the infrastructure required for cross-country skiing, including trails and parking areas, is already in place at the Bull Mountain Trails. Additional locations for the expansion of cross-country skiing that are suitable are not expected to exist. Ski touring does not necessarily require groomed trails. The other winter activities also do not require any specific infrastructure. They can make use of existing trail systems and Crown land areas, assuming permission is obtained. However, support infrastructure at locations other than Bull Mountain Trails (e.g., directional and interpretive signage, parking, washroom and waste facilities) would potentially be needed. Overnight camping facilities may also be needed to accommodate multi-day experiences involving snow camping. Due to unreliable snow levels and higher development and maintenance costs, huts would not likely be justified.

With respect to capital requirements for ongoing operations, adequate reserves should be set aside for trail maintenance and marketing of the guiding operations. A non-profit organization such as a club has potentially more funding avenues for infrastructure construction, including lotteries and fundraisers.

Annual rent to BCAL for a license of occupation for winter activity trails or guiding operations on extensive areas of Crown land is currently calculated at $1/client day, with a minimum of $500 per year. Rent for intensive use sites (e.g., overnight campsites for extended trips) which may be within the extensive area is charged as a percentage of market value of the land, with a minimum rent of $500 per annum for a base camp and a $100 minimum for each additional satellite camp or facility. An annual tenure management fee of $100 is also required.

Economic Assessment Summary

Economic Assessment Summary – Winter Tourism	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - Moderate

7.2.8.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Given that these activities are practiced during a limited and off-season and subject to the intended locations, the compatibility of winter tourism activities with other local recreation and community uses is expected to be moderate to high. Little to no conflict is anticipated, although it would be important to choose areas away from identified mechanized winter activity use areas such as trails used by snowmobiles.

Compatibility with Other Economic Uses

Compatibility of winter tourism activities with other economic uses of areas in which winter tourism activities might take place is also expected to be generally moderate to high, although potential conflicts could occur with other resource users. Depending on location, potential conflicts could arise with logging truck traffic on narrow winter roads.

Community Acceptance / Local Economic Development Support Potential

Winter tourism activities are seen to have strong potential community acceptance and local economic development support. The types proposed are seen by the local community as environmentally friendly and of low impact. They are also considered compatible with tourism development objectives for the study area. Depending on the nature of the request, economic development support could potentially come from TWL, CCCTA, CWL-EDC, CEAF, RDC and CFDC.

Local Skills Availability

Existing capacity and availability of local skills to operate and staff winter tourism activities is moderate. Some expertise is available, but limited. Training is required in the area of tour guiding.

Social and Community Assessment Summary – Winter Tourism	
Compatibility with local recreation and community uses	Moderate – High
Compatibility with other economic uses	Moderate – High
Community acceptance / local economic development support potential	High
Local skills availability	Moderate

7.2.8.6 Potential

In the Central Cariboo, cross-country skiing is practiced mainly by local residents. There are more extensive trail systems available in other neighbouring areas, particularly the 99-Mile-100 Mile-108 Mile area. This area made significant investments in the development of world-class trails and related infrastructure several decades ago as well as organizing events, including an annual Marathon. These measures together with marketing and promotion have given the area a high profile among cross-country skiers. In contrast, the Central Cariboo's has no profile as a cross-country ski destination. Moreover, the snow conditions are generally not reliable enough in the Central Cariboo to develop more cross-country trails, including ones that could be linked to the 100 Mile House area trails. Consequently, the activity must be focussed on the Bull Mountain Trails which can accommodate additional skiers at this time but do not have unlimited expansion capacity.

The Central Cariboo is also at a disadvantage for offering ski touring. The study area does not have the same quality or quantity of mountains, back country areas, or trail systems available in the neighbouring areas to both the west and east. Moreover, these areas have established reputations as excellent destinations for these activities.

Nonetheless, there is potential to increase winter tourism in the Central Cariboo. For example, existing accommodation properties could also develop packages featuring snowshoeing, ice fishing and dog sledding. They could also partner with other tourism operators to develop winter packages that involve the visitor staying at one of the properties in the study area with day trip excursions to the better known cross-country skiing and ski touring areas that are near to but outside the study area.

The construction of a destination lodge would likely help to develop the winter tourism market. Such a lodge could market multi-activity winter weekend getaway packages aimed at attracting residents from the GVRD and other near-by markets, as well as some internationalvisitors.

There is also the potential to draw more visitors to the area by expanding the Bull Mountain Challenge, and by staging winter mountain biking events. Developing a major winter festival or series smaller events is another option to help increase winter tourism. Programming for such events could include dog sled races, ice sculpting, hay rides, barbecues, cross-country ski events, snowshoe events, and ice fishing derbies.

7.2.9 Scenic Driving Tours

The touring market can be divided into three major categories:

- **Independent travellers** – travel parties who take self-guided tours and make their own transportation, accommodation and other travel arrangements

- **Independent packages** – travel parties who take self-guided tours and pre-purchase rental vehicles, accommodations and other travel arrangements
- **Group travellers** – travel parties who pre-purchase a guided tour and travel in a group

Touring is a popular activity for travellers and BC is well known for its scenic touring. Scenic driving tours are defined as tours that follow a road route, either paved or unpaved, and include sightseeing, road-side viewing of wildlife, visits to communities and photography.

7.2.9.1 Resource Assessment

Available Resources

A number of local loop tour routes originating and ending in Williams Lake are available, all of which combine travelling on paved and unpaved roads. Suitable for scenic driving tours, these routes are briefly described as follows:

- Alkali Lake / Gang Ranch – routing is Highway 20 to Farwell Canyon Road (2200 Road) to Word Creek Road to Dog Creek Road to Highway 20. Natural and cultural attraction highlights on the route include Alkali Lake village, Alkali Lake Ranch, Alkali Lake Wildlife Sanctuary, Dog Prairie (WWII aircraft stopover site), Dog Creek village, Fraser Canyon vistas, Gang Ranch, Churn Creek Protected Area, Farwell Canyon, Junction Sheep Range Park, ancient pictographs, and a seasonal native dipnet fishery at the bridge at Farwell Canyon. Trip duration is one half day to one day.
- Chimney Lakes – routing is Highway 97 to Enterprise Road to Chimney Lake Road to Dog Creek Road to Highway 20. Natural highlights on the route include a trio of beautiful lakes – Chimney, Felker and Brunson. Trip duration is one to three hours.
- Riske Creek / Big Creek / Hanceville – routing is Highway 20 to Farwell Canyon Road (2200 Road) to Big Creek Road to Big Creek to Fletcher Lake to Hanceville to Highway 20 (note: Hanceville is outside the boundaries covered by the TOS). Natural and cultural highlights on the route include Riske Creek village, Farwell Canyon, Big Creek village, Fletcher Lake, historic Hanceville (1875 trading post), ancient pictographs and a seasonal native dip fishery at the bridge at Farwell Canyon.
- Fraser River Tour – routing is Highway 97 to Soda Creek to Marguerite Ferry to West Fraser Road to Rudy Johnson's Bridge to Soda Creek to Highway 97. Natural and cultural highlights on the route include Soda Creek village, Xats'ull Heritage Village, ancient pictographs, and the Fraser River. Trip duration is one half to one full day.
- Sugarcane / Mission Road – routing is Highway 97 to Sugarcane Indian Reserve to Onward Ranch to Highway 97 and 150 Mile House. Natural and cultural features on the route include Sugarcane village, the 1895 Church of the Immaculate Conception, Onward Ranch, a pioneer cemetery (the oldest in the region), and 150 Mile House village, formerly an important site on the Cariboo Waggon Road and site of a restored 1890's schoolhouse. Trip duration is one to two hours.
- Farm Circle Tour (Meldrum Creek / Soda Creek / MacAlister) – routing is Highway 97 to Soda Creek to MacAlister to Marguerite Ferry to Rudy Johnson's Bridge to Old Soda Creek Road. Agricultural features on the route include viewing produce - including Ginseng, corn, berries, herbs, apples and melons - flowers and exotic birds such as emus, rheas and peacocks. Trip duration is one half day to one day.

In addition to these local circle tour routes, the Central Cariboo falls within the Discovery Coast Passage Circle Tour route. This route is a duration of seven to nine days in total, and involves travelling from Vancouver to Nanaimo by ferry to Port Hardy by land to Bella Coola by ferry and, via Highway 20, to Williams Lake and way points before heading back to Vancouver via Clinton, Lillooet and Whistler.

Based on the locational criteria assessment matrix, the Williams Lake and Grasslands sub-zones were assessed to have the best potential for scenic driving tours. Comments on the potential of each sub-zone for scenic driving tours are as follows:

- Williams Lake and Grasslands offer easy highway access to scenic areas. Taseko Lake scores highly for its scenic beauty but is less accessible.
- Beaver Valley and South Chilcotin score quite highly for their scenic beauty, and Beaver Valley also has good accessibility.
- Taseko Lake sub-zone scores relatively high for its scenic potential, and Gaspard has a potential circle route, but loose surface roads and logging roads predominate these sub-zones.
- Palmer has low potential, because of difficult access and industrial uses.

Product Frequency

There are no operators offering guided scenic driving tours in the Central Cariboo. Little is done to promote self-guided tours of tour routes, with the exception of promoting them in local tourism publications. A "Farm Circle Tour" map is available to guide visitors using that tour route, but otherwise promotional and interpretive materials have not been developed for the tour routes.

Supporting Infrastructure

Roads suitable for two wheel driving are the main infrastructure requirement for scenic driving tours. To fully develop this type of tourism, the tour routes must have good directional and interpretive signage, scenic viewpoints and rest stops. The existing road infrastructure can accommodate scenic driving tours, although upgrading may be required on some portions.

Resource Assessment Summary

Resource Assessment Summary – Scenic Driving Tours	
Quantity of associated resource	Moderate
Quality of associated resource	Moderate
Optimal resource units	Williams Lake, Grasslands
Quality of resource compared to other BC	Moderate
Quantity of resource compared to other BC	Moderate
Product frequency	Low - Moderate
Supporting infrastructure	Moderate – High

7.2.9.2 Assessment of Government Policy

Tenure / Licensing / Other Requirements

Other than permits and licenses for business and transport operations, government requirements for land tenuring and licensing are not required for commercial guided scenic driving tour operations which only travel on public roads. Commercial use of roads in public forests would not require agreements with the Ministry of Forests but arrangements with timber companies operating in those forests should be reached to avoid user conflicts. Conducting commercial tours within provincial parks (by vehicle and/or on foot) would require park use permits. Consultation should be conducted with and approval sought from First Nations communities whose communities and reserve lands operators of scenic driving tours intend to travel to and through.

If the scenic driving tour is to include stops to permit passenger foot access to trails and viewing structures on Crown land for the purposes of hiking or nature observation, and if the operator prefers to develop and provide them privately for such commercial use, then licenses of occupation for Long Term Use of an Extensive Area would be required from BCAL. Conducting infrequent or seasonal and otherwise low impact guided hikes or nature observation walks on Crown land as part of a scenic driving tour would only require temporary permits for Short Term Low Impact Use from BCAL. No tenure would be required for one-time low impact guided walks into these areas.

Alternatively, if the operator of the scenic driving tour wished to provide access to existing public trails or nature observation facilities, then agreements for their use and maintenance would be required from the Ministry of Forests or other agency with responsibility for the facilities in question.

Licenses of occupation do not provide exclusive use and occupancy of the area involved and they generally carry a maximum term of 10 years unless integral to a lease or similar development on private land. Granting of a license would be subject to an approved management plan with performance requirements, minimum $1 million third party liability insurance, other potential reports and minor documentation and application fees. Additionally, an annual payment of rent must be paid by the proponent to BCAL. Requirements are less onerous when temporary permits are applicable.

It may be preferable for scenic driving tour operators to enter into working relationships with existing trail-related guiding operators so that they would not have to obtain such licenses directly.

Government Policy Assessment Summary

Government Policy Assessment Summary – Scenic Driving Tours	
Tenure / licensing / other requirements	Public roads – No Crown lands - Yes

7.2.9.3 Market Assessment

Market Demand and Characteristics

A study recently conducted for the Canadian Tourism Commission on US leisure travel to Canada found that the touring segment was the largest travel segment, representing 35% of the travel market in the six metropolitan areas studied. This segment was found to be motivated by touring small towns and villages, taking driving tours, visiting historic sites and museums/galleries, trying local cuisine, seeing cultural attractions and visiting parks. These travellers tend to be female (59%), less likely to have children under 18 living at home (30%), older, and hold a college or university degree (PriceWaterhouseCoopers, 1999).

Figure 7.9 provides estimates of visitor volume for BC touring product in 1994. Of the total touring travellers, it is estimated that 80% are independent travellers, 5% are independent packages and 15% are group travellers (Price Waterhouse/ARA, 1995).

Figure 7.9: Visitor Volume Estimates for Touring Product: 1994

Visitor Volume	BC	Regional	N. America Long Haul	Overseas	Total
Touring as Main Trip Purpose	1,207,710	862,030	807,360	278,720	3,155,820
VFR as Main Trip Purpose & Touring as Secondary Purpose	788,564	224,678	208,568	71,539	1,293,349
Total Touring	1,996,274	1,086,708	1,015,928	350,258	4,449,169

Travel Trade Input

The travel trade interviews indicated that the development of scenic circle tour routes might not draw many new visitors to the Central Cariboo. However, well-developed and promoted routes would likely help to increase the length of stay and expenditures of visitors to the study area.

Seasonality

Scenic driving tours could be a year round tourism product, however the summer months are generally the most popular for touring, with potential for a low to moderate level of touring occurring in the spring and autumn months.

Market Assessment Summary

Market Assessment Summary – Scenic Driving Tours	
Appeal to existing tourism markets	Moderate
Market growth trends	Moderate
Origin of potential visitors	BC, North America
Compatibility with other products	Low
Seasonality	Low

7.2.9.4 Economic Assessment

Revenue potential

The revenue potential of scenic driving tours can be anywhere from low to moderate depending on how the experience is delivered (i.e., self-drive or guided tour including transport). Revenue sources can include simply the purchase of interpretive materials or refreshments by independent travellers or outside tour groups on a self-drive excursion or they can involve the purchase of a day-long guided scenic drive excursion in a local commercially operated vehicle. Furthermore, pricing levels for guided scenic driving tours can vary depending on trip duration as well as package inclusions (e.g., entry to an Aboriginal attraction). Capacities of vehicles used will also influence the revenue generation potential of guided scenic driving tours, as will seasonal weather conditions and visitation patterns to the area. At the low end of the delivery spectrum, scenic self-driving tour routes serve more as an incentive measure to attract, retain and distribute visitors in the study area – thereby benefiting other local businesses – rather than as a commercial operation in its own right.

This revenue can be supplemented by using the vehicles for other purposes such as providing transport services on a contract basis to operators of other tourism activities (e.g., hiking, nature observation) as well as to local residents and businesses. This will require careful scheduling of all activities during the busy tourist season.

Businesses in the study area can also benefit by selling admissions (i.e., to attractions), supplies and services to the scenic driving tour participant or guide operator, as well as accommodating and servicing visitors who stay in the area longer than has traditionally been the case.

Employment potential

The employment potential of scenic driving tours also depends greatly on how the experience is delivered and is therefore also rated as low to moderate. Self-drive tours will primarily generate employment for establishments where such items as touring materials, gasoline, refreshments and souvenirs can be purchased or for attractions visited en route. The existence of scenic driving tours should also generate employment for restaurants and accommodation facilities if excursionists then stay in the area overnight.

Guided scenic driving tour operations are often owner-operated and generate only a small number of seasonal (and often multi-task) jobs – for reservations, guiding and interpretation, transportation, marketing. Owner/operators may retain a portion of profit earned or draw a salary while paid staff may earn minimum wage or moderate levels of income based on their skills and responsibilities. As with revenue potential, employment potential can be enhanced by expanding operations to include contract services to other tourism and local users.

Hiring local residents to assist with operations should not be difficult. However, training will be required to develop the necessary skill sets for guiding, interpretation and visitor services.

Capital requirements

As indicated in the resource assessment, the existing road infrastructure can accommodate scenic driving tours (with some upgrading potentially required) and a number of circle drives using such roads do already exist in the Central Cariboo. However, good promotional and interpretive materials, directional and interpretive signage, scenic viewpoints and rest stops are needed. If the tours are to go beyond self-drive, vehicles for operators interested in offering guided scenic driving tours will also be needed. These require capital for development and maintenance.

Given the good extent and standard of the existing roads and circle routes, the need for promotional materials, signage and viewing facilities, the possible need for vehicles and the generally small scale of guided scenic driving tour operations, anywhere from low to moderate levels of investment would be required to develop the required support infrastructure and/or to operate guided scenic driving tours. Adequate reserves should also be set aside for reprinting of promotional and interpretive materials, road maintenance and improvements, marketing (and vehicle maintenance for the guide operations).

If passengers are to also visit trails and nature observation facilities provided by the commercial scenic drive operator on extensive areas of Crown land, then annual rent to BCAL for a license of occupation for such trails and viewing facilities or guided access is calculated at $1/client day, with a minimum of $500 per year. An annual tenure management fee of $100 is also required. Costs for temporary permits to conduct infrequent or seasonal and otherwise low impact guided hikes or nature observation walks on Crown land as part of a scenic driving tour would be much less.

Economic Assessment Summary

Economic Assessment Summary – Scenic Driving Tours	
Revenue potential based on average expenditures	Low - Moderate
Employment potential based on nature / number / duration of jobs and income levels	Low - Moderate
Capital requirements	Low - Moderate

7.2.9.5 Social and Community Assessment

Given their closer familiarity with the study area's resident and business community and its economic development objectives, members of the Local Advisory Committee for this study were asked by the consultants to assume responsibility for undertaking the social and community assessment of the short-listed ecotourism development opportunities. The following synthesizes the assessments provided by several members of the LAC.

Compatibility with Local Recreation and Community Uses

Depending on the routes and schedules of the circle driving tours proposed by operators and desired by travellers, the compatibility of circle driving tours with local recreation and community uses is expected to be high and minimal conflicts are anticipated. Such tours should be easily melded with most other recreation uses, as viewing these activities can be appealing in itself. The exception could be on roads to be used by both scenic driving tour operators and by local recreationalists and community members seeking to access their intended destinations when the capacities of such roads are limited and when potential use from these and other multiple user types becomes high.

Compatibility with Other Economic Uses

Again subject to the routes and schedules of the circle driving tours proposed by operators and desired by travellers, the compatibility of scenic driving tours for tourists with other economic uses of the roads and areas accessed is expected to be generally moderate to high. Potential for conflict will arise where viewscapes are jeopardized and noise pollution evident. Safety issues may also arise with logging truck traffic on roads that might also incur high touring volume use (e.g., Farwell Canyon).

Community Acceptance / Local Economic Development Support Potential

Offering scenic driving tours to tourists is seen to have strong potential community acceptance and local economic development support. Such tours should be readily accepted as they are likely to have very little impact. The community wants to have a tourism product to sell and sees itself in competition with Quesnel which has claim to Barkerville. Scenic driving tours are considered compatible with tourism development objectives for the study area. Depending on the nature of the request, economic development support could potentially come from CCCTA, CWL-EDC, TWL, CEAF, RDC and CFDC, with farm circle tours potentially receiving additional support from the Ministry of Agriculture.

Local Skills Availability

Existing capacity and availability of local skills to design and develop circle drives and operate and staff guided scenic driving tours for tourists in the study area is high. Training is required however in the area of tour guiding, interpretation and visitor services.

Social and Community Assessment Summary – Scenic Driving Tours	
Compatibility with local recreation and community uses	High
Compatibility with other economic uses	Moderate - High
Community acceptance / local economic development support potential	High
Local skills availability	High

7.2.9.6 Potential

The Central Cariboo contains all of the critical resource attributes for scenic driving tours including the existence of circle tour routes and the presence of interesting features. The diverse topography, high scenic values, unique natural features and cultural and heritage assets of the Central Cariboo mean that all of the two wheel drive roads in the region have potential for scenic driving tours. Opportunities to view wildlife from the roadside are an added bonus.

With effective product development and marketing of touring product, the tourism industry in the Central Cariboo can take better advantage of the considerable highway traffic that already passes through the area, increasing the length of stay of visitors and therefore their expenditures in the community. In addition, fly-drive or rail-drive packages can be developed for visitors entering the area by those modes of transport, and the development of guided touring packages can help to attract the group tour market. Local guided scenic driving tour operations can also be formed, providing the opportunity to those visitors to the area without their own or hired ground transport to appreciate the area's natural wonders.

In order to fully capitalize on the tourism potential of scenic driving touring, however, it will be necessary to address a number of success factors. Since a key factor influencing the touring traveller's length of stay and trip expenditure is having things for them to see and do, the coordination of product development and marketing efforts of the communities and tour operators along the route is very important. Given that there are few built attractions along the routes, the focus of attractions should be the interpretation of the natural and cultural resources.

Equally important to success is that the touring roads are safe and well-maintained for two wheel drive traffic. Since road infrastructure is a government responsibility, this implies it will be necessary for the community to work with the province to obtain the upgrading required on some portions of the routes, including upgrades to the roads themselves and to rest stops and directional and interpretive signage. The community will also need to work with the government, the CCCTA, economic development agencies and private operators to develop and maintain well-designed supporting materials (i.e., clear maps, information and interpretive materials), safe and interesting viewpoints, and road-side services. Other initiatives that will encourage more visitors to take advantage of the routes will be the development of themed routes, short interpretive walks at rest stops, and opportunities to sample local culture and food along the route.

It will be particularly important to develop materials, including web sites, that highlight the features of the routes and allow travellers to pre-plan their touring routes. The promotion of routes to tour companies who bring individual and group travellers into the area will also be key to the success of the touring product.

7.2.10 Aboriginal Tourism

As noted at the beginning of Section 7, MSBTC and the LAC felt it was inappropriate to identify specific Aboriginal tourism development opportunities without the active involvement of First Nations in the preparation of the TOS. However, given the significant market interest in Aboriginal tourism, and the potential for the expansion of Aboriginal tourism offerings in the Williams Lake study area, the following information is provided in hopes of supporting current and future First Nations' tourism development efforts.

Aboriginal tourism is tourism that is aimed at appreciating and understanding Aboriginal culture and natural history. Aboriginal tourism experiences involve the history, customs, social structure and art of an Aboriginal culture.

Aboriginal Tourism Team Canada (ATTC) estimates that Canada's Aboriginal tourism sector has the growth potential to become a $1.6 billion industry, providing 30,000 to 40,000 jobs. Currently, the sector is estimated at $270 million and employs 14,000 to 16,000 basis, with one half of these jobs seasonal or part-time.

According to a study conducted by Yukon Tourism and the Western Memorandum of Understanding Committee in 1993, Western Canada is perceived to be the best destination in North America for Aboriginal tourism products among better educated people and persons with a higher level of interest in the Aboriginal product. Since people already think of Western Canada for Aboriginal tourism product, this perception provides British Columbia with a competitive advantage.

7.2.10.1 Tourism Potential Overview

As discussed in **Section 2.3.1**, there are six First Nations communities in the Central Cariboo. The Xats'ull (Soda Creek), Xatl'tem (Canoe Creek/Dog Creek), T(l)exelc (Williams Lake) and Esketemc (Alkali Lake) First Nations are part of the Secwepemc peoples, while the Tl'esquox and Stone First Nation are part of the Tsilhquot'in peoples. Several of the communities are already involved in tourism, while the others are generally interested in eco-cultural tourism development.

Xats'ull Heritage Village, an historic village site, is operated on a seasonal basis by Xats'ull First Nation, and offers petroglyphs, cultural programs, tours, arts and crafts workshops, traditional foods and sweat lodges. Xatl'tem First Nation is planning to begin offering guided trail riding & wagon rides at Churn Creek Park. T(l)exelc First Nation is developing the Spucwten (Spokin Lake) interpretive trail, and is interested in offering interpretive programs such as herbal walks, cleansing sweats, and wagon tours to heritage sites, fishing grounds, and the Sugarcane reserve along the Southside Trail and Williams Lake River Valley Trail. Campgrounds are operated by the Xats'ull, T(l)exelc and Xatl'tem.

All of the communities have very interesting histories, traditions and customs, and to some extent engage in traditional activities including salmon fishing, berry picking, plant gathering, song, dance and the making of arts, crafts and regalia. In addition to the living Aboriginal culture, cultural tourism assets in the region include petroglyphs, traditional trails and ancient pit house villages. Being that culture and nature are inseparable for Aboriginal peoples, ecotourism is also a natural component of Aboriginal tourism experiences. The Longhouse in Williams Lake could be used as a performance centre or a staging area for tours. In addition, the Williams Lake Friendship Society offers a quality arts and crafts shop and native décor dining.

An unique aspect of the Aboriginal culture in this area that has good tourism potential is the involvement, both traditionally and currently, of the Aboriginal community in the ranching industry. There were and still are a number of Secwepemc cowboys and ranchers, including rodeo competition winners and breeders of prize livestock.

7.2.10.2Market Demand and Characteristics

An analysis by Statistics Canada of culture/heritage travel reports that 2% (468,000) of the 14 million Canadians who took a domestic trip involving participation in culture/heritage activities attended an aboriginal/native cultural event (McDougall, 1998). There is no other statistical information on the size of the North American aboriginal tourism market, but market research indicates that the top motivations of travellers interested in Aboriginal tourism are:

- Learning about everyday life.
- Arts and crafts.
- Traditional land-based activities.
- Learning about the aboriginal view of the environment.
- Traditional food.

Recent analysis has found that there is growing primary and secondary European niche market interest in Canadian Aboriginal tourism. (ATTC and CTC, 2000) Related research also found that the South Korean and, to a lesser extent, Japanese markets also exhibit relatively high interest levels in native-oriented tourism products in general (CTC, November 1996).

The primary European markets for Aboriginal tourism experiences are the UK, Germany and France, while the secondary ones are the Netherlands, Italy and Switzerland. **Figure 7.10** provides information on overall demand for Aboriginal culture products in these markets including the percentage who participated in Aboriginal culture activities on their most recent trip and the percentage who are motivated by Aboriginal culture in destination selection. It also provides estimates of the size of the potential Aboriginal culture market to Canada in each respective country, and for the primary markets, estimates of the potential expenditures of each market. The analysis shows that the Italian, UK and German markets have the best potential for Canada with a combined 8.3 million potential Aboriginal culture travellers to Canada over the next five years (ATTC and CTC, 2000).

Figure 7.10: Aboriginal Cultural Tourism Market to Canada

UK	Germany	France	Italy	Netherlands	Switzerland
Participation in Aboriginal Cultural Activities on Most Recent Trip					
30%	50%	16%	53%	35%	45%
Motivated by Aboriginal Culture in Destination Selection					
52%	70%	62%	71%	40%	57%
Potential Market Size					
2,719,000	2,531,000	1,464,000	3,052,000	926,000	706,000
Expenditures (C$)					
$3,696,000	$6,135,000	$850,000	not available	not available	not available

Source: ATTC and CTC, 2000

The sociodemographics of the European target markets are summarized in **Figure 7.11**.

Figure 7.11: Sociodemographics of European Target Markets for Aboriginal Tourism

UK	Germany	France	Italy	Netherlands	Switzerland
Gender					
57% male 43% female	47% male 53% female	61% male 39% female	51% male 49% female	54% male 46% female	49% male 51% female
Average Age					
44	43	45	40	39	42
Highest Level of Education Completed					
32% college or university degree	20% college or university degree	38% college or university degree	60% higher education 13% university	29% higher education 12% university	10% higher education 18% university
Occupation					
32% white-collar worker	31% white-collar worker	34% white-collar worker	27% white-collar worker	N/A	41% other employees/ officials/representatives
19% non-working housewife/ unemployed /retired	20% non-working housewife/ unemployed /retired	27% non-working housewife/unemployed /retired	26% non-working housewife/unemployed /retired	N/A	18% non-working housewife/unemployed /retired
13% blue-collar worker	13% self-employed/ freelancer	17% university/college student	18% self-employed	N/A	16% managing employee/official
13% self-employed/ freelancer	12% university/college student	15% administrator/ manager	14% university/college student	N/A	10% self-employed
12% administrator/ manager	7% blue-collar worker	13% self-employed/ freelancer	12% tradesman	N/A	9% skilled/unskilled labourer
7% university/college student	6% administrator/ manager	5% blue-collar worker	4% blue-collar worker	N/A	7% student
Average Annual Household Income					
42% CDN$52,000	39% CDN$50,000	52% CDN$47,000	N/A	63% more than CDN$48,000	35% CDN$66,000-100,000 24% more than CDN$100,000

N/A = Not available

Following are other key points about the primary European markets (ATTC and CTC, 2000; CTC, 1996, KPMG, 1996):

- UK – Many UK Aboriginal cultural travellers travel to visit friends and relatives on their trip (27%). They tend to rely on the advice of friends and family (60%) when planning their trip.
- Germany – There is a very high level of interest in Aboriginal culture generally among Germans. About 85,000 people belong to the more than 300 "Indianer" clubs that exist throughout the country. The goal of many of these club members is to have an authentic Aboriginal experience in North America.
- Compared to the UK and French markets, German Aboriginal cultural travellers had the highest total trip expenditures (C$8,000) and they spent nearly twice as much per day (C$120). Nearly half of them used a package on their most recent trip (48%). They tend to rely on travel agents (69%), printed materials (54%) and the library (17%) when planning their trip. They enjoy travelling in Western Canada.

  Since much of the existing Aboriginal theme tourism product targets the German market, there is already significant competition for this relatively small market.

- France – The French market potential applies mainly to Eastern Canada because most French tour operators work primarily in the provinces of Quebec and Ontario, and most French tourists visit only those provinces.

  Just over one half of French Aboriginal culture travellers used a package on their most recent trip. They are more likely to rely on the advice of business colleagues (13%) when planning a trip.

The results of the 1998 *BC Visitor Study* suggest that the potential market for Aboriginal tourism experiences in BC is significant. The study reports high participation rates in visits to First Nations cultural sites by all the non-resident markets: Europe (43%), Long Haul US (34%), Asia Pacific (31%), Long Haul Canada (25%), Regional US (20%) markets and Regional Canada (18%). These, together with the BC resident market (9% participation), translate into a potential market of nearly 3.4 million adults, as per **Figure 7.12**.

Figure 7.12: Potential First Nations Cultural Market for BC

	Number of Overnight Visitors	Participation in Visits to First Nations Cultural Sites	Number of Overnight Cultural Visitors
BC Residents	10,762,000	9%	968,580
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT and Yukon Territories)	3,456,000	18%	622,080
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	2,431,000	20%	486,200
Long Haul US (California, Hawaii, Mountain, Central & Eastern Seaboard States, and Mexico)	1,673,000	34%	568,820
Long Haul Canada (Rest of Canada)	1,146,000	25%	286,500
Asia/Pacific	797,000	31%	247,070
Europe	508,000	43%	218,440
Total Size of the Potential First Nations Cultural Market			**3,397,690**

Source: Tourism British Columbia, 1998; ARA calculations.

Travel Trade Input

The travel trade interviews indicated that there is moderate demand in North America and fairly strong international demand for BC Aboriginal tourism product, and that demand is growing for educational Aboriginal tourism product. The tour company representatives think that the addition of new Aboriginal tourism product in the Williams Lake area would be beneficial for tourism development.

7.2.10.3Potential

There is a diversity of Aboriginal tourism assets available in the Central Cariboo. With these assets as a base, there is potential to develop other built attractions such as traditional villages as well as a wide range of interpretive programs that meet the growing market for "ed-ventures". Examples of such programs include song and dance performances, participatory arts and crafts programs, and nature tours such as herbal walks. There is also potential to enhance and build upon the existing products and services available in the region, such as Xats'ull Heritage Village, the Long House in Williams Lake and the Williams Lake Friendship Society's native gift shop and dining room.

Success in the marketplace requires that the Aboriginal tourism products offered be authentic, high quality, reliable and consistent. To ensure cultural authenticity will require that the following five requirements be met as product is developed (ATTC, no date):

- Aboriginal people must own and participate in the business
- Traditional and current Aboriginal techniques and methods must be used
- Local customs and culture must be accurately portrayed
- The local Aboriginal community must be involved
- The natural environment and its creatures must be treated with respect

The LAC and MSBTC recognize the importance, and potential for expansion, of Aboriginal tourism in the Williams Lake study area. To achieve this potential, the LAC recommends that the tourism sector offer to work with First Nations in their tourism development efforts.

8. Ecotourism Action Plan

8.1 Context

The purpose of this study is to identify ecotourism opportunities for the Williams Lake study area (referred to from a resource management perspective as the Central Cariboo) that advance the study area's objectives related to development of a sustainable ecotourism industry, diversification of its economic base, and the provision of a rich experience for visitors. Within the context of these objectives, the process of identifying appropriate ecotourism development opportunities has been consultative – involving the tourism industry, other private sector stakeholders, government representatives and the travel trade. Based on the results of these consultations, a strategic framework was established to guide the action plan. Described in **Section 6** of this report, the key strategic directions are:

1. Coordination and capacity building;
2. Programs including product development and packaging, market development and ecotourism awareness and investment promotion; and
3. Priority ecotourism development opportunities.

This strategic framework was developed to provide a foundation for advancing action on ecotourism development in a context acceptable to the study area. While many of the initiatives in this framework are applicable to the broader tourism industry, the focus of this action plan is on the ecotourism sector. Given the results of the consultative process and the research we have undertaken, it is our view that the identification and priorization of ecotourism development opportunities alone will not achieve the desired outcomes for this project. There are issues that need to be addressed in order to strengthen the environment within which ecotourism development can take place and encourage new entrants to participate in the ecotourism sector. At the present time, the study area faces many issues constraining development of its tourism sector including ecotourism, namely:

- Lack of an appropriate identity and positioning in the marketplace;
- A strong resource base presenting opportunities for national and international visitors but without all elements of product quality that such visitors demand;
- Lack of packaging including the development of strong relationships with tour operators and the travel trade;
- The need for a greater awareness of tourism potential and the investment opportunities available in tourism;
- Training needs.

These issues cannot all be addressed through the pursuit of specific ecotourism development opportunities. Strengthening the business performance of existing tourism operations is as important as pursuing new opportunities and therefore a number of programs are essential to assist existing industry. The ancillary benefit is a far stronger environment for new tourism and ecotourism investment.

In this context, the action plan comprises two main components:

- Program recommendations; and
- Priority ecotourism development opportunity recommendations.

The action plan recommendations are summarized in **Figure 8.1** and described in the remainder of this section. They are further developed in **Figure 8.2** to include suggested assignment of responsibilities, timing and resources. The detailed action plan is not complete however with respect to assigning responsibilities and identifying partners for support since that is pending on preferences of the coordinating body and stakeholder base.

Figure 8.1: Action Plan Summary

Area	Programs	Actions
1. Coordination and Capacity Building	1.1 Coordination Set-up	1.1.1-1.1.4 Build awareness, solicit support 1.1.5-1.1.7 Explore and develop delivery mechanisms 1.1.8 Create and empower ecotourism sector task force comprising industry and government representatives 1.1.9 Coordinate with other Tourism Opportunity Studies
	1.2 Capacity Building	1.2.1 Identify resources for capacity building 1.2.2 Develop a web site 1.2.3 Undertake training programs
2. Programs	2.1 Product Development and Packaging Approaches	2.1.1 Packaging seminars/workshops 2.1.2 Best Practices examples 2.1.3 Hospitality Programs 2.1.4 Cooperative stewardship
	2.2 Market Development	2.2.1 Market information packages 2.2.2 Market development workshops 2.2.3 Travel trade workshops 2.2.4 Alignment of district and provincial tourism marketing
	2.3 Ecotourism Awareness and Investment Promotion	2.3.1 Publication of opportunity assessments 2.3.2 Business and resource/product planning workshops
3. Priority Ecotourism Development Opportunities	3.1 Action Plan for Critical Product Development	3.1.1 Refine edited market-driven product definitions for priorities 3.1.2 Interpretive workshop planning 3.1.3 Marketing strategy for freshwater sport fishing 3.1.4 Marketing plan for the Central Cariboo

Source: ARA/KPMG Consulting recommendations.

8.2 Action Plan Recommendations – Study Area Level

1. District-wide Coordination and Capacity Building

One of the key issues identified during the course of the consultation and research relates to the absence of effective leadership in pursuing tourism sector development. The tourism industry association is linked to other associations and to the provincial tourism agencies on a marketing basis but little is done in the way of product development and support for product development. In order to pursue ecotourism development opportunities, study area-wide, intra-regional and inter-regional coordination and leadership is essential and needs to be addressed. Without it, one can expect that little will be achieved in the way of implementation of the recommendations of this report. This action plan focuses on study area-wide efforts.

1.1 Study Area-wide Coordination Set-up

It is recommended that some delivery mechanism such as a task force for the ecotourism sector be established for the purposes of implementing this action plan. It should be comprised of representatives from all stakeholder groups – the ecotourism industry, government, communities, First Nations, and others. The ecotourism industry should chair the task force. By establishing such a study area-wide coordination mechanism, the profile of ecotourism will also be raised and a focus on ecotourism activity and implementation of this action plan will be enhanced.

Actions recommended to establish such a mechanism include:

1.1.1 Invite key stakeholders to public meeting on the draft Tourism Opportunity Study in Williams Lake on March 12, 2001.

1.1.2 Present the Williams Lake Forest District Tourism Opportunity Study, along with those for the three other forest districts in the region, and the mid-coast forest district at the Cariboo Coast Chilcotin Tourism Association Annual General Meeting on April 19-20, 2001

1.1.3 Conduct a meeting of primary agencies to explore and determine avenues and responsibilities for: a) advancing the Tourism Opportunity Study through awareness building; b) ecotourism product development; c) identifying champions; and d) forming and empowering the selected mechanisms (e.g., task force) etc.

1.1.4 Build awareness by presenting findings and recommendations of the TOS to a broader stakeholder audience through various avenues (e.g., at AGMs) starting at the study area level, then on to the regional and provincial levels (including funding agencies) in order to solicit input and support and identify/engage champions.

1.1.5 Discuss with government agencies within/outside the study area where responsibility for ecotourism product development should be assigned (e.g., expand mandates of existing agencies, create new mechanisms, etc.).

1.1.6 Reconvene the primary agencies with the objective of developing the mechanisms to implement the Tourism Opportunity Study, including determining whether to form an ecotourism task force and if so, defining its mandate and awarding it powers, providing and sourcing technical and financial resources and support as required.

1.1.7 Apply to the Ministry of Community Development's "Community Enterprise Fund" for funds to develop the Ecotourism Task Force.

1.1.8 Create and empower an ecotourism sector task force comprising industry and government representatives.

Note: The actions which follow below in this plan are required regardless of whether a task force is formed. It has been assumed that a task force is formed with responsibility for driving the implementation of this TOS. Modifications to the assignment of responsibilities in the plan will be required if an alternative approach to delivery is adopted as an outcome of Actions 1.1.1 through 1.1.7.

1.1.9 Consult and coordinate with neighbouring TOS study areas and with other regions in BC to ensure complementarity and consistency among the Tourism Opportunity Studies, refining the Williams Lake Forest District Tourism Opportunity Study as appropriate.

1.2 Capacity Building

Some capacity building is necessary to strengthen the ability of institutions to deliver programs related to ecotourism product development as part of the action plan. In particular, it is important that local tourism organizations be strengthened in order to provide the leadership necessary for and through the task force. Recommended actions include:

1.2.1 Identify the resources available for capacity building from federal, provincial, municipal and private sector sources.

1.2.2 Develop a web site for the Central Cariboo ecotourism sector to serve as a resource centre for information on product development, training, tourism activity in the study area and in British Columbia, and such other resources as may be appropriate for the study area. (This is not viewed as an onerous recommendation given that much of the resource material might be available by way of linkages. The important point is that this information has simply not been assembled in a readily useable central point for tourism sector access.)

1.2.3 Deliver appropriate training programs to support task force activity (e.g., project management, etc.).

2. Programs

In order to set a sound foundation for implementing the ecotourism development opportunities and enhancing the prospects for the existing tourism sector, a number of programs are recommended. They should be carried out in parallel as they are interdependent.

2.1 Product Development and Packaging Approaches

Increasing awareness and understanding of the product development and packaging process is essential to strengthening the Central Cariboo's ecotourism sector. In this regard, a number of specific actions are recommended for implementation:

2.1.1 Deliver packaging seminars and workshops – targeted to the existing tourism sector and potential entrepreneurs and including seminar leaders/speakers from the travel trade.

2.1.2 Publish examples of best practices in product development and packaging – again oriented to the existing and potential tourism entrepreneurs to assist them in reviewing their businesses against examples of best practices and in making appropriate improvements.

2.1.3 Hospitality training – deliver in each community and including a tourism awareness component to foster a greater sensitivity to and understanding of tourism's contribution to the social-economic fabric of the Central Cariboo, with additional emphasis in the City of Williams Lake on its role as a service centre.

2.1.4 Develop and implement cooperative stewardship programs – involving both industry and government agencies to identify where and under what conditions cooperative stewardship of the resource base can take place. This should include the creation of a demonstration or pilot project to serve as a test case and ultimately a best practice.

2.2 Market Development

Successful implementation of an action plan to strengthen the ecotourism sector cannot be done without a much greater orientation to market development for the Central Cariboo. For example, the interview process for this project revealed a consistent and unrelenting message from the travel trade to develop more quality accommodation. Greater exposure to market information, trends and linkages is important, not only for the existing tourism operators, but for potential entrepreneurs. In addition, the positioning of the Central Cariboo as an ecotourism destination should form part of this action plan. Specific recommendations are:

2.2.1 Publish packages of information on markets – by origin and by activity wherever possible. This information should be made available to tourism operators and entrepreneurs through the web site suggested under action step 1.2.2 above.

2.2.2 Deliver market development workshops – providing workshops for existing and potential tourism operators focusing on market trends, needs and expectations relative to the product mix in the Central Cariboo. These workshops should be structured as working sessions where operators are able to review market development practices ranging from initial positioning of the product to marketing plan implementation.

2.2.3 Conduct workshops with the travel trade – perhaps carried out in conjunction with the packaging seminars in action recommendation 2.1.1 above. The theme here is to have the travel trade inform and work with Central Cariboo operators on requirements for products (including service centre-related, e.g., booking centre for activities) they are encountering that meet market needs and expectations beyond those markets already served by the district.

2.2.4 Re-align Central Cariboo marketing to reflect the strategic framework developed in the project including positioning and market themes for the district. This should also include discussions with Tourism BC to develop an aligned position within the destination marketing undertaken by Tourism BC.

2.3 Ecotourism Awareness and Investment Promotion

This program is oriented to fostering an increased awareness of the benefits of tourism and ecotourism activities for the study area. A key theme should include fostering investment in the ecotourism sector – both by existing operators seeking to upgrade and/or expand and by new operators – all consistent with the study area's strategic framework. Specific action recommendations are:

2.3.1 Publish the opportunity assessment results for the study area on the web site and in hard copy format. The task force should encourage distribution locally through government offices at all levels and economic development organizations, in addition to tourism industry publications.

2.3.2 Deliver business and resource/product planning workshops – targeted to existing businesses seeking to upgrade and/or expand and potential new entrepreneurs. These workshops would provide technical skills, advice and information on business planning, resource planning including the government regulatory regime, and product planning in the context of sustainable use of the resource base.

8.3 Action Plan Recommendations – Priority Ecotourism Development Opportunities

3. Priority Ecotourism Development Opportunities

Central Cariboo ecotourist sector stakeholders selected nine priority ecotourism development opportunities. These were derived from over 20 possibilities and reflected those most consistent with the vision selected for the study area. Assessments of each opportunity were undertaken in **Section 7** of this report, providing background information for prospective investors or tourism operators. The consultants have concluded that all of the shortlisted opportunities are appropriate for the study area but recommend certain priorities that the Central Cariboo should pursue in the short term in order to have the greatest impact in terms of advancing the contribution of the ecotourism sector.

The challenge in setting priorities for the ecotourism development opportunities rests in adopting a market-driven approach. No matter how outstanding the resource base might be for any particular activity, if it does not appeal to the market for one reason or another it will simply raise local expectations beyond realistic levels. Therefore, we have assessed the ecotourism development opportunities against two key criteria as follows:

a) Product development critical to increased ecotourism in the region – as judged in terms of both market potential and the perspectives of the travel trade. It is noted that meeting market expectations for the travel trade will result in product equally attractive to independent (FIT) travellers. This criteria relates to both facilities and competitive travel generators (vis a vis other destinations in the province).

b) Product development desirable for the district – but not critical in terms of its capacity to attract significant additional tourism.

Using these criteria, the result in terms of our view of critical product development is shown in the table below.

Ecotourism Development Opportunity	Product Critical to the District	Product Desirable for the District
Destination lodge	✓	—
Western theme tourism	✓	—
Freshwater fishing	✓	—
Trail riding (Horseback)	—	✓
Mountain biking	—	✓
Hiking	—	✓
Wildlife viewing/Natural features	—	✓
Winter tourism	—	✓
Scenic driving tours	—	✓

For product critical to the study area's ecotourism sector growth in the short term, we have priorized the three products shown above as "critical". The travel trade has observed that destination lodges of sufficient quality for ecotourism/adventure travellers are important for the markets that they serve. Whether this be in the form of new destination lodges or upgrading of existing accommodation facilities is probably less important than the question of increased quality itself.

In the case of freshwater fishing product, this study area is reported to have a resource base for freshwater fishing the equal of nearby competing districts. The fact that it is less well known is a constraint to increased ecotourism business. Within the context of sustainable levels of freshwater fishing activity, increased business should be possible from increased marketing and effective positioning of the Central Cariboo for this product.

Our view, and shared by many in the travel trade and in the district itself, is that the western theme is a strong one and can serve to add a distinguishing feature to the perception of the Central Cariboo in the minds of the marketplace. The ranching history is an important attribute that can be strengthened through both interpretation and western activities such as trail riding and experiences at working ranches.

The remaining ecotourism development opportunities are all important in their own right but require facilities such as quality accommodation or travel generators such as the western theme to attract people to the study area. None of the ecotourism development opportunities designated as "desirable" can be viewed as a travel generator vis a vis the alternatives consumers have in other areas. Therefore it is important to clearly focus in on the study area's strengths, develop these, and build from that base.

In addition to these three priority ecotourism products, the demand for aboriginal eco-cultural tourism is very strong, both nationally and internationally. Therefore, it will be important for the study area to work with the First Nations communities to pursue at least a demonstration product in this area, showcasing the Aboriginal community and its history in a sensitive and interesting way.

3.1 Action Plan for Critical Product Development

Specific action recommendations related to the priorities are described below.

3.1.1 Develop a strong, market-driven orientation to the priority ecotourism development opportunities in order to refine the specifics to the district through the following actions:

a) Hold a workshop with the travel trade to gather input on both accommodation upgrade and potential new destination lodge market requirements including identification of potential travel trade needs in terms of bookings (i.e., service centre role for City of Williams Lake).

b) Gather input from the travel trade on the specific offerings desired with respect to the western heritage themes and including interpretive activities and soft adventure activities such as horseback riding, accommodation, and packaging.

c) Examine competitive western theme destinations/initiatives to identify lessons learned.

d) Hold an industry stakeholder workshop on sport fishing product, bringing in travel trade specializing in sport fishing and identifying particular strengths and market niches that should be pursued for the Central Cariboo.

3.1.2 Hold a training workshop on interpretive planning and techniques for ecotourism product development with particular emphasis on what the district needs in order to move its product development plans forward. This includes special reference to western theme tourism and nature interpretation related to activities such as hiking, horseback riding and mountain biking. The purpose of this workshop is to provide tools and techniques for the tourism sector to apply in their own businesses.

3.1.3 Develop a marketing strategy specifically for sport fishing, taking into account the Central Cariboo's competitive advantage with other destinations in BC based on the results of 3.1.1 above.

3.1.4 Develop a marketing strategy and plan for the Central Cariboo – reflecting the strategic framework approved by the LAC and phased to coincide with the action plan for critical product development. The marketing plan should reflect the results of action recommendation 2.2.4 above.

Aboriginal tourism is also considered important for ecotourism development, but can only be addressed in close co-operation with the First Nation communities.

Figure 8.2: Detailed Action Plan by Area

1. Study Area-wide Coordination and Capacity Building

One of the key issues identified during the course of the consultation and research relates to the absence of effective leadership in the district to pursue ecotourism sector development. The tourism industry association is linked to other associations and to the provincial tourism agencies on a marketing basis but little is done in the way of product development and support for product development. In order to pursue ecotourism development opportunities, study area-wide, intra-regional and inter-regional coordination and leadership is essential and needs to be addressed. Without it, one can expect that little will be achieved in the way of implementation of the recommendations of this report. First, awareness must be generated about the potential opportunities and work to-date in this regard.

It is recommended that a **task force** for the ecotourism sector be established for the purposes of implementing this action plan, comprising representatives from all stakeholder groups (the ecotourism industry, government, communities, First Nations, and others). The ecotourism industry should chair the task force. By establishing such a coordination mechanism, the profile of ecotourism will also be raised and a focus on ecotourism activity and implementation of this action plan will be enhanced.

Some **capacity building** is necessary to strengthen the ability of institutions to deliver programs as part of the action plan. In particular, it is important that local tourism organizations be strengthened in order to provide the leadership necessary for and through the task force.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
1.1 Coordination Set-up	1.1.1 Invite key stakeholders to public meeting on the draft TOS in Williams Lake on March 12, 2001	MSBTC, LAC, TOS Consultants	-	I	-
	1.1.2 Present the WLFD TOS, along with those for the three other forest districts in the region and Mid-Coast forest district, at the CCCTA's AGM on April 19-20, 2001	TOS Consultants	MSBTC, CCCTA	I	$
	1.1.3 Conduct a meeting of primary agencies to explore and determine avenues and responsibilities for: a) advancing the TOS through awareness building, b) ecotourism product development, c) identifying champions, and d) forming and empowering the selected mechanisms (e.g., task force) etc.	CWL-EDC	To be determined	I	$
	1.1.4 Build awareness by presenting findings and recommendations of the TOS to a broader stakeholder audience through various avenues (e.g., at AGMs) starting at the study area level, then on to the regional and provincial levels (including funding agencies) in order to solicit input and support and identify/engage champions. (Refer to the Responsibility/Partners list in the Key to Abbreviations at the end of this detailed action plan for potential target audiences.)	To be determined	MSBTC, CCCTA, CWL-EDC, CEAF, TWL/CofC	I	$$
	1.1.5 Discuss with government agencies within/outside the study area where responsibility for ecotourism product development should be assigned (e.g., expand mandates of existing agencies, create new mechanisms, etc.).	To be determined	To be determined	I	$

1. Study area-wide Coordination and Capacity Building (continued)

Program	Action	Responsibility*	Partners*	Timing**	Resources***
1.1 Study area-wide Coordination Set-up (continued)	1.1.6 Reconvene the primary agencies with the objective of developing the mechanisms to implement the TOS, including determining whether the form an ecotourism task force and if so, defining its mandate and awarding it powers, providing and sourcing technical and financial resources and support as required	To be determined	CWL-EDC, others to be determined	I (aim for March 2002)	$
	1.1.7 Apply to the Ministry of Community Development's "Community Enterprise Fund" for funds to develop the Ecotourism Task Force.	To be determined	MCD	I	$
	Note: The actions which follow below in this plan are required regardless of whether a task force is formed. It has been assumed that a task force is formed with responsibility for driving the implementation of this TOS. Modifications to the assignment of responsibilities in the plan will be required if an alternative approach to delivery is adopted as an outcome of Actions 1.1.1 through 1.1.7.				
	1.1.8 Create and empower an ecotourism sector task force comprising industry and government representatives.	To be determined	To be determined	I	$$$ (annual)
	1.1.9 Consult and coordinate with neighbouring TOS study areas and with other regions in BC to ensure complementarity and consistency among the TOSs, refining the WLFD TOS as appropriate	Task Force	MSBTC, CCCTA, CWL-EDC, TWL	S	$$
1.2 Capacity Building	1.2.1 Identify the resources available for capacity building from federal, provincial, municipal and private sector sources	To be determined by task force	To be determined by task force	S	$ - $$
	1.2.2 Develop a web site for the Central Cariboo ecotourism sector to serve as a resource centre for information on product development, training, tourism activity in the study area and in British Columbia, and such other resources as maybe appropriate for the study area	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	1.2.3 Deliver appropriate training programs to support task force activity (e.g., project management, etc.)	To be determined by task force	To be determined by task force	S - M	$$

2. Programs

In order to set a sound foundation for implementing the ecotourism development opportunities and enhancing the prospects for the existing tourism sector, a number of programs following three core streams set out below are recommended. They should be carried out in parallel as they are interdependent.

1) Increasing awareness and understanding of the **product development and packaging** process is essential to strengthening the Central Cariboo's ecotourism sector.

2) Successful implementation of an action plan to strengthen the ecotourism sector cannot be done without a much greater orientation to **market development** for the Central Cariboo. For example, the interview process for this project revealed a consistent and unrelenting message from the travel trade to develop more quality accommodation. Greater exposure to market information, trends and linkages is important, not only for the existing tourism operators, but for potential entrepreneurs. In addition, the positioning of the Central Cariboo as an ecotourism destination should form part of this action plan.

3) **Ecotourism awareness and investment promotion** is oriented to fostering an increased awareness of the benefits of tourism and ecotourism activities for the study area. A key theme should include fostering investment in the ecotourism sector – both by existing operators seeking to upgrade and/or expand and by new operators – all consistent with the study area's strategic framework.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
2.1 Product Development and Packaging Approaches	2.1.1 Deliver packaging seminars and workshops – targeted to the existing tourism sector and potential entrepreneurs and including seminar leaders/speakers from the travel trade.	To be determined by task force	To be determined by task force	M	$$
	2.1.2 Publish examples of best practices in product development and packaging – oriented to the existing and potential tourism entrepreneurs to assist them in reviewing their businesses against examples of best practices and in making appropriate improvements.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.1.3 Hospitality training – deliver in each community and including a tourism awareness component to foster a greater sensitivity to and understanding of tourism's contribution to the social-economic fabric of the Central Cariboo, with additional emphasis in the City of Williams Lake on its role as a service centre.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.1.4 Develop and implement cooperative stewardship programs – involving both industry and government agencies to identify where and under what conditions cooperative stewardship of the resource base can take place. This should include the creation of a demonstration or pilot project to serve as a test case and ultimately a best practice.	To be determined by task force	To be determined by task force	S and ongoing	$$ - $$$

2. District-level Programs (continued)					
Program	**Action**	**Responsibility***	**Partners***	**Timing****	**Resources*****
2.2 Market Development	2.2.1 Publish packages of information on markets – by origin and by activity wherever possible. This information should be made available to tourism operators and entrepreneurs through the web site suggested under action step 1.2.2 above.	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	2.2.2 Deliver market development workshops – providing workshops for existing and potential tourism operators focusing on market trends, needs and expectations relative to the product mix in the Central Cariboo. These workshops should be structured as working sessions where operators are able to review market development practices ranging from initial positioning of the product to marketing plan implementation.	To be determined by task force	To be determined by task force	M and ongoing	$$
	2.2.3 Conduct workshops with the travel trade – perhaps carried out in conjunction with the packaging seminars in action recommendation 2.1.1 above. The theme here is to have the travel trade inform and work with Central Cariboo operators on requirements for products (including service centre-related, e.g., booking centre) they are encountering that meet market needs and expectations beyond those markets already served by the district.	To be determined by task force	To be determined by task force	M	$$
	2.2.4 Re-align Central Cariboo marketing to reflect the strategic framework developed in the project including positioning and market themes for the district. This should also include discussions with Tourism BC to develop an aligned position within the destination marketing undertaken by Tourism BC.	To be determined by task force	To be determined by task force	S and ongoing	$$$
2.3 Ecotourism Awareness and Investment Promotion	2.3.1 Publish the opportunity assessment results for the study area on the web site and in hard copy format. The task force should encourage distribution through government offices at all levels, in addition to tourism industry publications.	To be determined by task force	To be determined by task force	S - M and ongoing	$$
	2.3.2 Deliver business and resource/product planning workshops – targeted to existing businesses seeking to upgrade and/or expand and potential new entrepreneurs. These workshops would provide technical skills, advice and information on business planning, resource planning including the government regulatory regime, and product planning in the context of sustainable use of the resource base.	To be determined by task force	To be determined by task force	M and ongoing	$$

3. Priority Ecotourism Development Opportunities

Each of the nine shortlisted opportunities are appropriate for the study area but it is recommended that certain priorities should be pursued in the Central Cariboo in the short term in order to have the greatest impact in terms of advancing the contribution of the ecotourism sector.

The challenge in setting priorities for the ecotourism development opportunities rests in adopting a **market-driven approach**. No matter how outstanding the resource base might be for any particular activity, if it does not appeal to the market for one reason or another it will simply raise local expectations beyond realistic levels. Product considered critical to the study area's ecotourism sector growth in the short term include a destination lodge, western theme tourism and freshwater fishing. Aboriginal tourism is also considered important for ecotourism development, but can only be addressed in close co-operation with the First Nation communities.

Program	Action	Responsibility*	Partners*	Timing**	Resources***
3.1 Action Plan for Critical Product Development	3.1.1 Develop a strong, market-driven orientation to the priority ecotourism development opportunities in order to refine the specifics to the study area through the following actions:				
	a) Hold a workshop with the travel trade to gather input on both accommodation upgrade and potential new destination lodge market requirements including identification of potential travel trade needs in terms of bookings (i.e., service centre role of the City of Williams Lake).	To be determined by task force	To be determined by task force	S	$ - $$
	b) Gather input from the travel trade on the specific offerings desired with respect to the western heritage theme tourism and including interpretive activities and soft adventure activities such as horseback riding, accommodation, and packaging.	To be determined by task force	To be determined by task force	S	$ - $$
	c) Examine competitive western theme destinations/initiatives to identify lessons learned.	To be determined by task force	To be determined by task force	S	$$
	d) Hold an industry stakeholder workshop on sport fishing product, bringing in travel trade specializing in sport fishing and identifying particular strengths and market niches that should be pursued for the Central Cariboo.	To be determined by task force	To be determined by task force	S	$$
	3.1.2 Hold a training workshop on interpretive planning and techniques for ecotourism product development with particular emphasis on what the study area needs in order to move its product development plans forward. This includes special reference to the western theme tourism and nature interpretation related to activities such as hiking, horseback riding and mountain biking. The purpose of this workshop is to provide tools and techniques for the tourism sector to apply in their own businesses.	To be determined by task force	To be determined by task force	M	$$
	3.1.3 Develop a marketing strategy specifically for sport fishing, taking into account the Central Cariboo's competitive advantage with other destinations in BC based on the results of 3.1.1 above.	To be determined by task force	To be determined by task force	L and ongoing	$$

3. Priority Ecotourism Development Opportunities (continued)

Program	Action	Responsibility*	Partners*	Timing**	Resources***
3.1 Action Plan for Critical Product Development (continued)	3.1.4 Develop a marketing strategy and plan for the Central Cariboo – reflecting the strategic framework approved by the LAC and phased to coincide with the action plan for critical product development. The marketing plan should reflect the results of action recommendation 2.2.4 above	To be determined by task force	To be determined by task force	M and ongoing	$$$

KEY TO ABBREVIATIONS:

***RESPONSIBILITY/PARTNERS:**

ABC	Aboriginal Business Canada
AtBC	Aboriginal Tourism Association of BC
BCAL	British Columbia Assets & Lands Corporation
BCEAD	British Columbia Environmental Assessment Office
BCP	BC Parks
CCCSC	Cariboo Chilcotin Community Skills Centre
CCCTA	Cariboo Chilcotin Coast Tourism Association
CEAF	Cariboo Economic Action Forum
CFDC	Community Futures Development Corporation
CoC	Chamber of Commerce
CRD	Cariboo Regional District
CWL-EDC	City of Williams Lake Economic Development Commission
ETF	Ecotourism Task Force
FishRBC	Fisheries Renewal BC
FRBC	Forest Renewal British Columbia
HRDC	Human Resources Development Canada
LAC	Local Advisory Committee for Tourism Opportunity Study
MCD	Ministry of Community Development
MELP	Ministry of Environment, Lands and Parks
MoFish	Ministry of Fisheries
MoF	Ministry of Forests
MSBTC	Ministry of Small Business, Tourism and Culture
Private	Private Operators
RCEP	Regional Community Enterprise Program
RDC	Regional Development Investment Consortium
TBC	Tourism British Columbia
TCs	Tribal Councils
TT	Travel Trade
TWL	Tourism Williams Lake
WLVIC	Williams Lake Visitor Information Centre

****TIMING:**

I	Immediate (prior to Task Force creation)
S	Short-term (less than one year after Task Force formed)
M	Medium-term (1-3 years after Task Force formed)
L	Long-term (3+ years after Task Force formed)

*****RESOURCES:**

$	Small amount of funds required (i.e., less than $10,000)
$$	Moderate amount of funds required (i.e., $10,000 to $50,000)
$$$	Large amount of funds required (i.e., more than $50,000)

OTHER:

TOS	Tourism Opportunity Study
WLFD	Williams Lake Forest District

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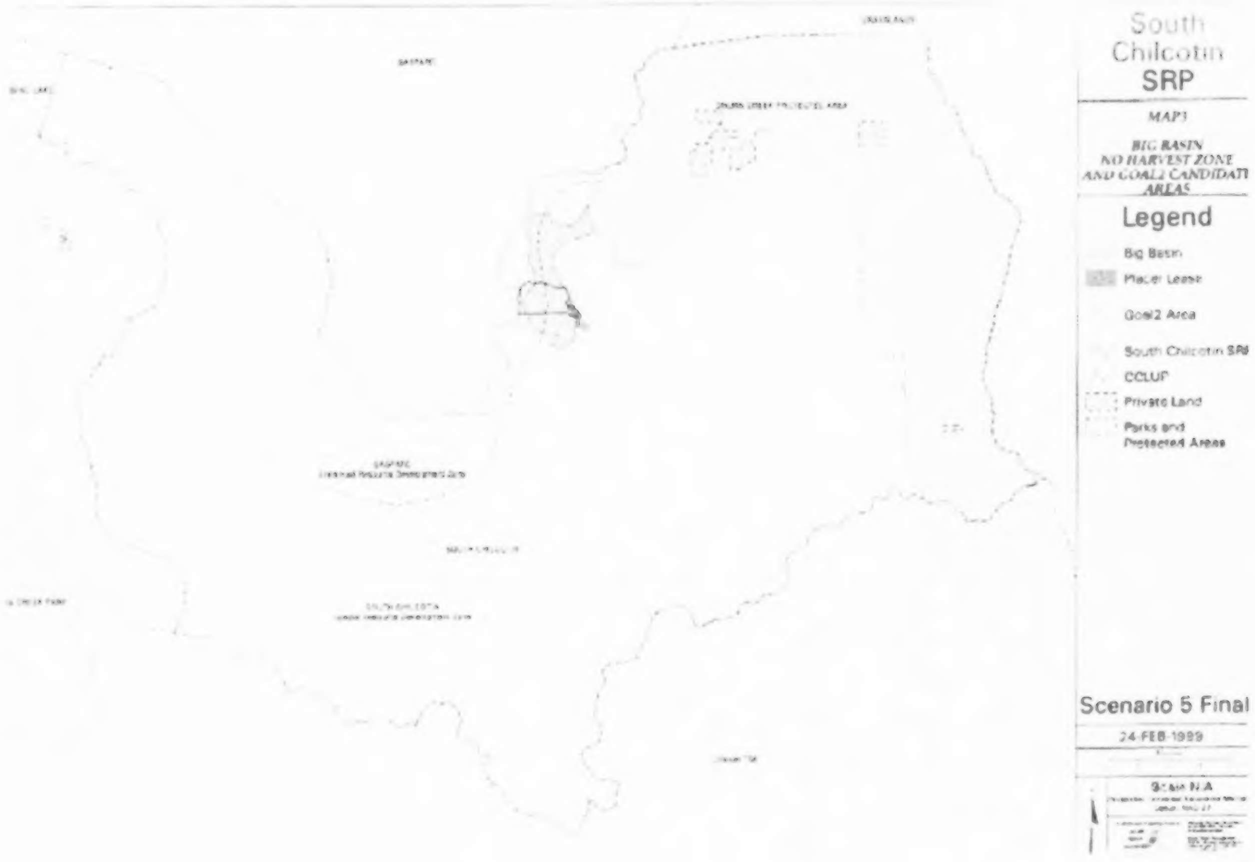


South Chilcotin SRP

MAP 1

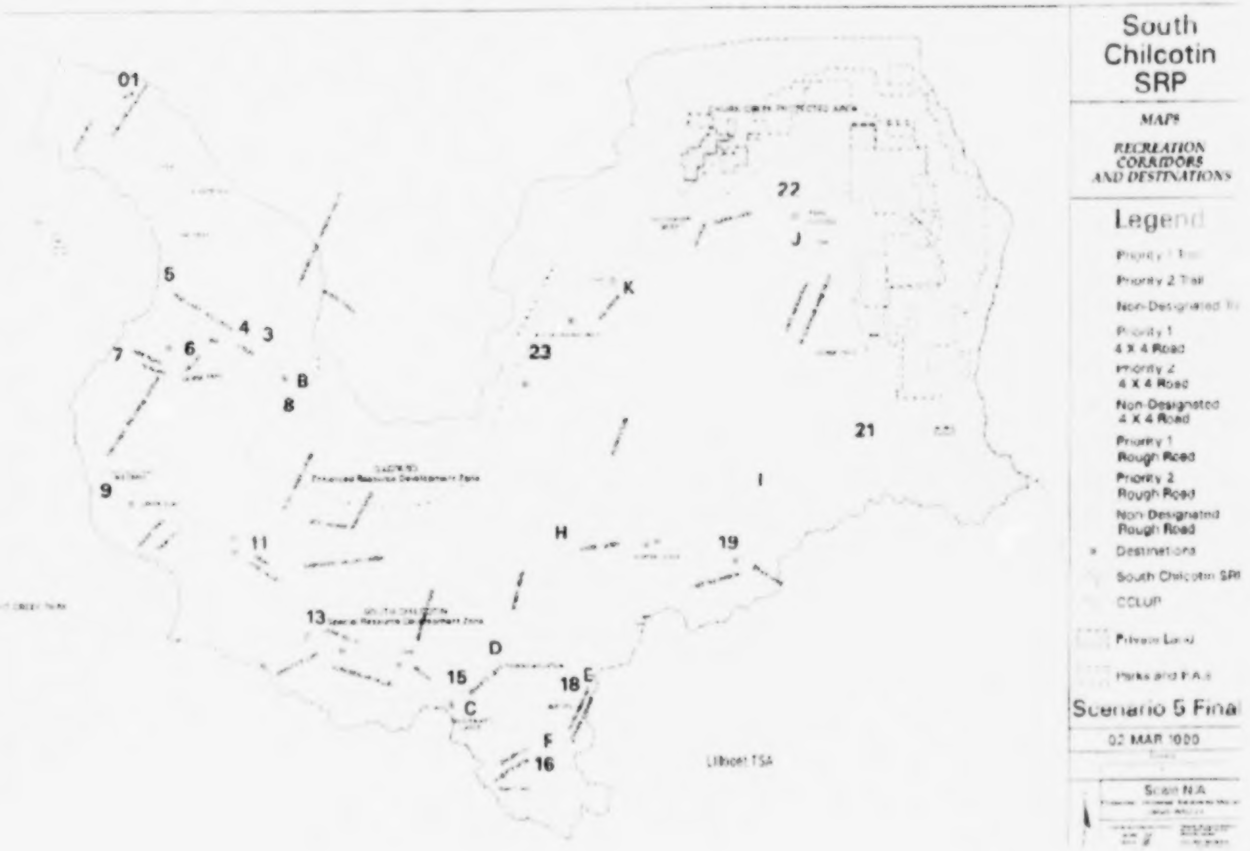
BIG BASIN NO HARVEST ZONE AND GOAL2 CANDIDATE AREAS

Scenario 5 Final

24-FEB-1999

Legend
Big Basin
Placer Lease
Goal2 Area
South Chilcotin SRP
CCLUP
Private Land
Parks and Protected Areas
Scale N.A

South Chilcotin SRP
MAP
BACKCOUNTRY AREA
Legend
South Chilcotin SRP
CCLUP
Private Land
Parks and Protected Areas
Scenario 5 Fina


South Chilcotin SRP
MAPS
RECREATION CORRIDORS AND DESTINATIONS
Legend
Priority 1 Trail
Priority 2 Trail
Non-Designated Tr
Priority 1 4 X 4 Road
Priority 2 4 X 4 Road
Non-Designated 4 X 4 Road
Priority 1 Rough Road
Priority 2 Rough Road
Non Designated Rough Road
Destinations
South Chilcotin SRI
CCLUP
Private Land
Parks and P.A.s
Scenario 5 Final
02 MAR 1000
Scale N.A
01
5
4
3
7
6
B
8
9
11
13
Special Resource Development Zone
Enhanced Resource Development Zone
15
C
D
18
E
F
16
23
K
22
J
21
I
H
19
Lillooet TSA

SOUTH CHILCOTIN

South Chilcotin SRP

MAP9

VISUAL MANAGEMENT

Legend

- Big Creek Viewshed A
- Big Creek Viewshed B
- Big Creek Viewshed C
- Recreation Viewshed
- South Chilcotin SRP
- CCLUP
- Private Land
- Parks and Protected Areas

Scenario 5 Final

24-FEB-1999

Scale N/A

Lillooet TSA

South Chilcotin SRP

MAP 11

LAKES CLASSIFICATIO[illegible]

Legend

Lakes [illegible]

South Chilcotin SR[illegible]

CCLUP

Private Land

Parks and Protected Areas

25 FEB 1999

Scale N/A

9.0 SUMMARY OF PROTECTED AREA ACTIVITIES

The following table provides an overview of the management of specific activities within the Churn Creek Protected Area. It utilizes three categories for permitted, restricted and not permitted activities.

9.1 Permitted Activities

Activities that are allowed under normal management guidelines and are governed by relevant provincial legislation and regulations.

Activity	Comment/Rationale
Game Guiding	• Pre-existing operations continue at current levels under Park Use Permit • Managed in conjunction with BC Environment
Hunting	• Regulated in conjunction with BC Environment • Native hunting rights not affected • Mix of Motorized and Non-motorized hunting access determined by Zone.
Trapping	• Pre-existing licensed operations continue at current levels under Park Use Permit. • Managed in conjunction with BC Environment.
Non-Mechanized Recreation	• Non-commercial, public recreation that does not rely on machines or engines, including hiking and cross-country skiing.
Primitive Camping	• No permanent facilities or sites except where required to protect resources due to concentrated use. • Pack-in / pack-out policy. • Monitored for impacts; sensitive sites avoided.
Horseback Riding	• Non-commercial, personal use; generally intermittent and for pleasure or hunting. • Pack own pellet feed due to shortage of forage for non-wildlife uses. • Monitor for impacts. • Groups of 12 or more use trails.
Aboriginal Uses	• Managed consistent with BC Government policy. Allow for the continued exercise of aboriginal rights that may exist in accordance with the law.

9.2 Restricted Activities

Activities that may be permitted under stricter than normal management guidelines in the Protected Area.

Activity	Comment/Rationale
Mountain Biking	• Restricted to existing roads and trails. • Monitored for potential impacts.
Commercial Horse Use	• Primarily day use; authorize pre-existing operations. • Confined to designated trails and roads.
Habitat Restoration	• Controlled burning is permitted, subject to the conservation of Protected Area values and consistent with ecosystem protection roles.
Commercial ATV Use	• By permit only for ranch operations, trapline management, Conservation Officers or Protected Area management activities.
Fire Management	• Subject to the terms of fire management plan. Initial attack in interim • Prescribed fire permitted.
Forest Health and Pest Management	• Where possible, naturally occurring infestations will run their course. • Control actions integrated with those of the MoF will be considered where insect infestations in the Protected Area threaten adjacent resources. • Pest management decisions will be site-specific.
Angling	• Few fish resources in PA. • No fisheries enhancement. • No launching of motorboats in the Protected Area.
Aircraft Access	• Aircraft landing restricted to ranch operations and Protected Area management activities, including enforcement, public safety and fire fighting. Landings restricted to designated area.
Chemicals and biocontrols for noxious weed control	• Spot applications only • Weeds one the largest risks to grasslands.
Scientific Study	• Non-destructive study consistent with protected area management objectives. • Permanent research facilities such as camps or stations will not be permitted.

Activity	Comment/Rationale
Cougar, Lynx and Bobcat hunting with snowmobiles	• Managed in conjunction with BC Environment and subject to hunting regulations • Restricted to existing roads and trails; snowmobiles not permitted on grasslands
Snowmobiling	• Restricted to routes identified in access management strategy
Commercial Backcountry Camps	• No permanent structures or facilities. • Wilderness style camps. • Pack-in / pack-out policy.

9.3 Activities That Are Not Permitted

Activities that are not permitted by law within the Protected Area, or are considered incompatible with the management objectives for Churn Creek.

Activity	**Comment/Rationale**
All-terrain vehicles	• Potential impacts on grasslands and wildlife. • Inconsistent with *Park Act Regulations*. • Not a pre-existing use in Protected Area.
Commercial Jet Boating	• Not considered appropriate given high archaeological values and sheep escape terrain on Fraser River Breaks.
Commercial Rafting	• Not considered appropriate given high archaeological values and sheep escape terrain on Fraser River Breaks.
Road Construction	• No new roads. • Existing roads not maintained. • Except for minor access to facilities.
Mineral Exploration and Development	• Incompatible with management objectives and contrary to Order-In Council.
Timber Extraction	• Incompatible with management objectives and contrary to Order-In Council.

Appendix One
Summary Table of Acceptable Uses and Facilities

The following table provides a summary of acceptable uses, activities and facilities in the protected area.

Activity/Use/Facility	**Acceptable Uses**
Hunting	Y
Fishing	Y
Trapping	Y
Grazing (domestic livestock)	Y
Recreation Gold Panning/Rock Hunting	N
Utility corridors	N
Communication Sites	N
Horse Use/Pack Animals	Y
Guide Outfitting (hunting)	Y
Guide Outfitting (nature tours)	Y
Guide Outfitting (fishing)	Y
Guide Outfitting (river rafting)	M
Commercial Recreation (facility-based)	M
Backcountry Huts	M
Water Control Structures	N1
Fish Stocking and Enhancement	N
Road Access	N
Off-road Access (snowmobiling)	M
Off-road Access (motorized)	N
Mountain biking	Y
Motorized Water Access	N
Cat assisted skiing	N
Heli-skiing	N
Aircraft Access	M
Fire Management (suppression)	Y
Fire Management (prescribed fire management)	M
Fire Management (prevention)	Y
Forest Insect/Disease Control	M
Noxious Weed Control	Y
Exotic Insect/Disease Control	M
Scientific Research (specimen collection)	M
Scientific Research (manipulative activities)	M
Removal of Wildlife for Transplants	M

Y = allowed subject to conditions identified in the management direction statement or management plan
M = may be permitted if compatible with protected area objectives
N = not allowed
N1 = allowed for expressed management purposes only
N2 = present and allowed to continue but not normally allowed

F. Profiles of North American and European Ecotourists

F.1 North American Ecotourists

Early demand for ecotourism emerged in North America a century ago as visitors flocked to national parks to experience nature and scenery. Today, ecotourism demand continues to grow, reflecting contemporary environmental and social trends. The statistics indicate that the North American ecotourism market, comprised of both Canada and the US, is very large. Information on the size of this market is provided by several recent studies, including:

- A HLA/ARA study (1994) found a potential ecotourism market of 13.2 million travellers in only seven major metropolitan areas in Canada and the United States
- In 1996, 85% of Canadians aged 15 and over, or about 20 million people, participated in one or more nature-related activities (Infomat, 1998).
- The 1997 US Adventure Travel Survey reported that 50% of the 196 million US adults who had travelled in the previous 12 months had taken an adventure vacation, with 47% of travellers taking a "soft adventure" and 3% taking a "hard adventure" vacation (TIA, 1997).
- A joint survey by government agencies and the Sporting Goods Manufacturers Association found that 54 million Americans took part in birdwatching in 1994 (cited in Gustaitis, 1997).

F.1.1 Sociodemographics

Comparative analysis of recent studies of North American ecotourism and adventure travel markets reveals many sociodemographic commonalties, as is summarized **Figure F.1.**

F.1.2 Ecotourist Memberships and Publications

Memberships

Lanon Group (1990) found that ecotourists tend to belong to ecological groups such as Greenpeace, Sierra Club or the World Wildlife Fund. A survey of Canadian ecotourists to Kenya reported that 43% were members of conservation-oriented organizations, especially wildlife-related groups (Ballantine and Eagles, 1994). The HLA/ARA study found that 50% of experienced ecotourism travellers participated in nature organizations. However, the general interest ecotourist is much less likely to belong to such an organisation, with only 11% members of nature organisations (HLA/ARA, 1994).

Publications

The HLA/ARA study reported that 72% of experienced North American ecotourists read such publications, heavily favouring publications such as *Outdoor Life/Outdoors/Outside/Outdoor Canada* (36%). *National Geographic* is also popular at 17%. General interest ecotourists also have a high level of readership of such publications, with 61% reading outdoor and/or nature-oriented magazines. *National Geographic* is the magazine of choice for general interest ecotourists, with readership levels of the various segments ranging from 35% to 49%. Club publications are also favoured by both experienced and general interest ecotourists. Others read are general activity/sports, fishing/hunting, general nature, general travel, and wildlife related magazines (HLA/ARA, 1994).

Figure F.1: Sociodemographic Characteristics of North American Ecotourists

Study (yr)	Focus	Age (yrs)	Gender	Avg Income*	Education	Household Composition	Occupation
Backman & Backman (94)	Ecotourist	Middle to older aged	Mostly male	> US$50,000	At least some college	no information	high percentage professionals
Ballantine & Eagles (94)	Ecotourist	Avg. age 49 72% >40	55% female	US$48,000 (CDN$73,000)	79% some post-secondary 47% univ. deg.	no information	no information
Eagles & Cascagnette (95)	Ecotourist	11% 25-34 22% 35-44 46% 45-64	50%-50%	57% >CA$50,000 36% >CA70,000 Avg >CA64,000	64% univ. deg. 24% some post-secondary	no information	no information
HLA & ARA (94)	Experienced Ecotourist	Mainly 25 – 54	50%-50%	no information	82% univ. grad 14% some college/univ.	47% couple 24% couple with children 4% single with children 25% alone	no information
HLA & ARA (94)	General Interest Ecotourist	Mainly 25 – 54	50%-50%	Live in neighbourhoods with >US$35,000 (CA$45,000)[2]	44% univ. grad 30% some college/univ.	44% couple 35% couple with children 5% single with children 18% alone	no information
Kerlinger (93/94)[2]	Ecotourist - Birdwatcher	30 – 49	no info	43% US$50,000 or more	80% some college	no information	no information
Saleh & Karwacki (96)	Ecotourist	Avg. 41	60% male	US$22,000 (CDN$33,500)	37% univ. deg.	no information	no information
Saleh & Steadman (94)	Ecotourist	Avg. 44	60% male	no information	no information	no information	no information
TIA (98)	Soft Adventure traveller	18% 18-24 26% 25-34 26% 35-44 16% 45-54 9% 55-64 Median 39	51% male	41% US$50,000+ Median $US44,400	73% some college 40% college degree	67% married 57% have children	38% prof/mgr 14% blue collar 9& lower level technical/mg 9% clerical 9% retired
Tourism Canada (95)[3]	Adventure traveller	20–44	54% male	no information	no information	no information	no information

* US$0.655 = CDN$1

1 1994 exchange rates: US$0.78 = CDN$1
2 Cited in Dickinson & Edmondson (1996)
3 Cited in Industry Canada – Tourism Canada, 1993.

Includes both domestic and foreign adventure travellers.

F.1.3 Trip Characteristics

Trip Length

A survey of US tour operators that compared ecotourism tours with traditional group tours, found ecotours were longer than the traditional tours (Crossley & Lee, 1994). Yuan and Moisey (1992) found that Montana visitors interested in wildland based activities spent more time in the state than did non-wildland based visitors. Wildland based visitors spent between 5.99 and 10.82 days while vs. 3.66 days for non-wildland based visitors.

The research indicates that trips to more distant locations tend to be longer in duration. Nature based travellers at south-eastern US destinations tended to stay an average of five nights (Backman and

Potts, 1993) as compared to conservation group trips in Alaska, which averaged 12 days (ARA et al, 1991).

Figure F.2 shows that both experienced ecotourists and general interest ecotourists prefer a trip that lasts 8 or more days. Fifty percent of experienced ecotourists and 35% of general interest ecotourists were found to prefer that their total trip to last 8 to 14 days, while 20% of experienced ecotourists and 40% of general interest ecotourists prefer a trip of more than 14 days. However, it is also important to note that general interest ecotourists prefer that the ecotourism portion of their trip be shorter than the entire trip duration. For example, 40% preferred a trip of more than 14 days, but only 23% preferred the ecotourism portion to last that many days. This implies that most ecotourists prefer to have non-ecotourism experiences, such as beach activities, as part of their trip (HLA/ARA, 1994).

Figure F.2: Trip Length – Experienced & General Interest Ecotourists

Trip Duration	Experienced Ecotourist – Total Trip	General Interest Ecotourist - Total Trip	General Interest Ecotourist – Ecotourism Portion
1 to 3 days	1%	1%	10%
4 to 7 days	28%	24%	40%
8 to 14 days	50%	35%	27%
more than 14 days	21%	40%	23%

Time of Year

There are indications that the time of year when North American ecotourists travel varies by origin. Residents of northern cities (Toronto, Chicago, Winnipeg) prefer travelling in the winter months, while Californians are most interested in the months of September, October and November (HLA/ARA, 1994).

But the research also shows that ecotourists travel at all times of the year, as follows:

- A survey of US operators found that ecotourism trips were spread evenly throughout year (Crossley & Lee, 1994).
- The experienced ecotourism traveller has a higher preference level for every month of travel than did general consumers interested in ecotourism (HLA/ARA, 1994).
- Canadian ecotourists to Costa Rica usually travelled from February to April (Fennell and Smale, 1992).
- A survey of US-based tour operators specialising in nature travel to developing countries, found that August is the most frequent travel time (Ingram and Durst, 1989).
- North American ecotourists interested in Alberta and BC prefer to travel during the summer months (June to September) but many of them are willing to travel in the shoulder seasons (May and September) and there is also interest in winter travel (HLA/ARA, 1994).

Expenditures

Ecotourists spend considerable dollars on nature travel and other expenses. The American Birding Association estimated in 1991 that its members each spend an average of $4,623 on trips and equipment annually (Wauer, 1991). A US survey found that the total expenses associated with non-consumptive wildlife recreation – including travel, equipment, dues, magazines and donations – reached US$18.1 billion in 1991 (US Department of the Interior, Fish and Wildlife Service, 1993).

North American ecotourists are willing to spend US$2,000 per person for a trip incorporating ecotourism experiences. They are willing to spend an average of $238 per day, excluding travel expenses, on such a trip (HLA/ARA, 1994). Canadian ecotourists were found to spend much more than general travellers (Eagles and Cascagnette, 1995).

Expenditures by North American soft adventure travellers vary depending on age group. The Travel Industry of America's (TIA) adventure travel study found that older adventure travellers (55+) spent an average of US$1,300 on their most recent trip, while baby boomers (35 to 54 years) spent an average of US$950 and Generation Xers (18 to 34 years) spent an average of US$660. The study also found that there are spending differences among regional groups, with soft adventure travellers from the Northeast most likely to spend more than $US1000 on their most recent trip (25%) and those from the West most likely to spend less than $US250 (33%). Differences in spending were also found to be related to household incomes with, as would be expected, individuals from higher income households naturally spending the most on their trip (TIA, 1998).

Trip Planning

Sources of Information

The findings of several surveys are relevant to this study. **Figure F.3** summarizes the results of studies that examined the sources of information which ecotourists rely on for arranging their trips:

Figure F.3: Sources of Information

Study	Sources of Information
HLA/ARA (1994) – General Interest Ecotourist	• Friends – 37% • Been there before – 23% • Books/magazines – 16% • Travel brochure – 14% • Travel association/bureau – 14% • Word of mouth – 10% • Travel agent – 9% • Television – 2% • Other – 7%
Saleh & Steadman (1994)	• Destination brochure – 71% • Word of mouth – 32% • Friends/family – 23% • Travel infocentre – 23%
Saleh & Karwacki (1996)	• Destination brochure – 50% • Word of mouth – 24% • Friends/family – 23% • Travel infocentre – 25%

Trip Booking

The HLA/ARA survey (1994) found that the majority (65%) of general interest ecotourists made their own travel arrangements, followed by using a travel agent (30%) and club association (4%). In another relevant study, Lanon Group (1990) found that ecotourists tend to make their own travel arrangements using various print sources.

F.1.4 Travel Motivations and Preferences

Travel Motivations

Figure F.4 provides an overview of the top travel motivations of North American ecotourists as identified by a variety of studies.

Figure F.4: Travel Motivations

Study	Travel Motivations
Crossley & Lee (1994)	• learn/experience nature • learn/experience native culture • escaping • relaxation • entertainment
Eagles (1992)	• tropical forests (3.95**) • wilderness and undisturbed nature (3.94) • learn about nature (3.87) • birds (3.69) • lakes and streams (3.68) • trees and wildflowers (3.66) • photography of landscape/wildlife (3.58) • mammals (3.52) • be physically active (3.39) • meet people with similar interests (3.33) • mountains (3.32) • oceanside (3.32) • see maximum in time available (3.24) • rural areas (3.18)
Fennell & Smale (1992)	• seeing as much as possible (1.77*) • be physically active (1.88) • meeting people with similar interests (1.91) • experience new lifestyles (1.95) • visit historical places (2.35) • trying new foods (2.43) • being daring and adventuresome (2.62)

Study	Travel Motivations
HLA/ARA (1994) – experienced ecotourists (next trip)	• enjoy scenery/nature (45%) • new experiences/places (22%) • wildlife viewing (15%) • see mountains (14%) • wilderness experience (11%) • participate in water based activities (11%) • not touristy/crowded (11%) • experience cultural attractions (10%) • study/learn nature & cultures (10%)
HLA/ARA (1994) – General Interest Ecotourist (next trip)	• enjoy scenery/nature (45%) • new experiences/places (28%) • been there, want to go again (16%) • see mountains (15%) • experience cultural attraction (15%) • study/learn nature and cultures (14%) • rest/relax/get away (13%) • wilderness experience (12%) • visit family/friends (11%)
Saleh & Karwacki (1996)	• learn about environment and view a natural setting(29%) • learn about pioneer, cowboy and native culture (16%) • visit a national park (12%) • seek dinosaur fossils (9%)
Saleh & Steadman (1994)	• learn about the environment and nature (27%) • view a natural setting (20%) • participate in outdoor activities (11%) • visit a national park (10%) • learn about native culture (8%)
TIA (1994)	• get away from it all (51%) • try/learn something new (15%) • interest in environment (14%) • learn/test something about ourselves (7%)

* Represents mean score where: 1 = very important, 4 = not important at all.

** Represents mean score where: 4 = very important, 3 = somewhat important, 2 = not very important, 1 = not important at all.

Activity Preferences

Figure F.5 summarizes the results of those studies that collected information on the activity preferences of ecotourists.

Figure F.5: Ecotourist Activity Preferences

Study Details	Preferred/Important Activities
HLA / ARA (1994) – General Interest Ecotourist, preferred activities on next trip	• hiking (37%) • touring (20%) • camping (19%) • boating (17%) • walking (17%) • fishing (16%) • scenery other than mountain/ocean (14%) • swimming (12%) • other water activities (9%) • local cultures (8%) • cycling (8%) • wildlife viewing (7%) • skiing (7%)
HLA/ARA (1994) – Experienced Ecotourists, preferred activities on next trip	• hiking (60%) • rafting (25%) • cycling (25%) • camping (21%) • wildlife viewing (15%) • kayaking (13%) • scenery other than mountain/ocean (13%) • canoeing (13%) • fishing (12%) • local cultures (12%) • backpacking (11%) • touring (11%)
Russell et al (1995) – most popular client activities at ecolodges	• nature interpretation • wildlife tours • bird watching • trail hiking • river trips • vehicle safaris/trips
Saleh & Karwacki (1996) – activities participated in on a regular basis	• hiking (45%) • canoeing (39%) • cross-country skiing (39%) • bird watching (38%) • downhill skiing (19%)
TIA (1997) – most popular soft adventure activities	• camping (70%) • hiking (49%) • biking (30%) • bird/animal watching (26%) • horseback riding (26%) • canoeing (25%) • water skiing (22%) • snow skiing (19%) • 4X4 wilderness tours (17%) • sailing (14%) • photo safaris (8%) • visit cattle / dude ranch (7%)

Accommodation Preferences

At least two studies have suggested that the accommodation type chosen is a reflection of the overall vacation experience (Boo, 1990; HLA, 1994). Recent research related to accommodation preferences has found that experienced ecotourists prefer intimate, adventure type accommodations, such as cabins, lodges/inns and bed and breakfasts. Moreover, general travellers are also developing a preference for such smaller, more intimate accommodations (Hawkins et al, 1995; Selengut, 1995; HLA Consultants, 1996; Wight, 1997).

Figure F.6 provides the results of the HLA/ARA survey of North American ecotourists. In the case of experienced ecotourists, the survey found that although 41% identified hotels as an accommodation preference they were equally or more likely to prefer more intimate accommodation types, especially cabins, lodges/inns and ranches. The majority of general interest ecotourists interested in visiting BC identified hotels as their accommodation preference, but they are also interested in a variety of other accommodations including lodges/inns, cabins and B&Bs

Figure F.6: Accommodation Preferences of Ecotourists

Accommodation Type	Experienced Ecotourist	General Interest Ecotourist Interested in visiting BC
Cabin	66%	18%
Lodge/inn	60%	16%
Tent	58%	22%
Bed & Breakfast	55%	6%
Hotel/Motel	41%	55%
Ranch	40%	1%

Multiple responses allowed

When it comes to the quality of accommodations, both experienced ecotourists and general interest ecotourists expressed a preference for mid range (56% and 60%, respectively), followed by basic budget (38% and 31%, respectively) , and luxury accommodations (6% and 9%, respectively).

F.2 European Ecotourists

According to a World Travel & Tourism Council (WTTC) report, the European Union is the largest regional producer of travel and tourism in the world. European travel is forecast to grow at a real compound rate of 3.7% annually until 2005 (US Department of Commerce, 1997, sourcing WTTC). The following sections discuss in some detail the ecotourism-related market characteristics of the main European target markets for the Williams Lake Forest District, namely the U.K and Germany.

F.2.1 United Kingdom

International travel from the UK has increased significantly over the last two decades. In 1980, 17.5 million trips were taken by UK residents, compared to 41.5 million outbound trips in 1995, an increase of 137% (Coopers & Lybrand, 1996c).

Increased international travel has been identified as the single most important trend in UK holiday travel over the last two decades, with the proportion of holidays taken abroad doubling between 1980 and 2000. In 1980, 25% of all holidays lasting four or more nights were taken abroad, but by 1994 the percentage had risen to 45% and it is forecast to rise to 50% by 2000 (Burkitt Edwards Martin, 1996, citing TPR).

Much of the growth in the outbound market is related to the increase in travel to long haul destinations, which increased 190% between 1985 and 1995, compared to 78% growth for European destinations. As a result of this growth, the long haul market accounted for 19% of the outbound market in 1995, up from 12% a decade earlier (Coopers & Lybrand, 1996c).

The incidence rate for long haul pleasure travel, which includes adults who have taken a long haul pleasure trip in the last three years and those who are planning such a trip in the next two years, was estimated at 29.5% in 1996. Based on this incidence rate, there is a potential market of over 13.5 million long haul UK travellers, a dramatic increase from the 1986 incidence rate of 5% or 2 million travellers and the 1989 rate of 11% or 4.7 million travellers (Coopers & Lybrand, 1996c).

Profile of UK Ecotourists

There is one study that has looked at the characteristics and preferences of ecotourists (Diamantis, 1999). Its findings, summarized in the table on the following page, show that UK ecotourists resemble North American tourists.

Figure F.7: Profile of UK Ecotourists

Characteristic	Frequent Ecotourist	Occasional Ecotourist
Sociodemographics		
Age (years)	7% 17-24 15% 25-34 27% 35-44 24% 45-55 18% 55+	28% 17-24 28% 25-34 16% 35-44 17% 45-55 11% 55+
Gender	54% female	57% female
Income	13% <£10,000 15% £10,000-15,000 22% £15,000-20,000 17% £20,000-25,000 12% £25,000-30,000 21% >£30,000	33% <£10,000 12% £10,000-15,000 14% £15,000-20,000 14% £20,000-25,000 9% £25,000-30,000 18% >£30,000
Household	58% married 24% single 8% divorced	54% single 39% married 7% divorced
Education	38% first degree 25% secondary education 23% postgraduate education 15% high school	46% first degree 22% secondary education 21% postgraduate education 11% high school

Characteristic	Frequent Ecotourist	Occasional Ecotourist
Preferences		
Activity	72% educational guided tours 72% admiring nature 68% observing animals 54% bush walking 46% adventure tours 45% natural photography 40% observing flowers 38% snorkelling 35% bird watching 31% whale watching 22% horse riding 22% whitewater rafting 22% scuba diving 19% rock climbing	76% admiring nature 71% observing animals 62% snorkelling 60% educational guided tours 51% natural photography 49% camping 48% scuba diving 47% bush walking 37% adventure tours 37% observing flowers 33% whale watching 28% whitewater rafting 26% turtle watching 25% bird watching 21% horse riding
Accommodation Type	60% hotels/motels 41% tent 32% cabins 30% B&Bs 29% ecolodges 20% inns 6% ranches	53% tent 41% hotels/motels 25% B&Bs 23% cabins 19% ecolodges 10% inns 3% ranches
Accommodation Standard	40% basic/budget 58% midrange 2% luxury	47% basic/budget 48% midrange 5% luxury

F.2.2 Germany

In terms of number of tourist arrivals, Germany is the world's largest outbound tourism market. In terms of tourist expenditures, it is second only the US In 1997, 47 million Germans, or 53% of the population, took at least one domestic or foreign holiday trip lasting five or more days (US Dept. of Commerce, August 1998, sourcing FUR). Tourist expenditures for 1997 totalled US$4,142 million (US Dept of Commerce, August 1998).

Germans prefer to take foreign rather than domestic vacations: in 1997, 68.6% of German travellers chose foreign destinations (US Dept. of Commerce, August 1998). Although it is difficult to compare the German travel market before and after unification, long haul pleasure travel does appear to be increasingly popular among Germans. The market share for long haul travel has grown from 1% of the total pleasure market in 1970 to 10% of the market in 1995. Moreover, long haul market share is expected to increase rise dramatically, reaching the 20% to 30% range by 2000 (Coopers & Lybrand, 1996a).

The incidence rate for long haul pleasure travel, which includes adults who have taken a long haul pleasure trip in the last three years and those who are planning such a trip in the next two years, is estimated at 27.6%. Based on this incidence rate, there is a potential market of over 18 million long haul German travellers (Coopers & Lybrand, 1996a).

It is important to note that German travel law requires tour operators to present the holiday package exactly as described in the product brochure. If the client is dissatisfied with the package and it is the fault of the tour operator or its agents, the client can sue for damages (US Dept of Commerce, August 1998).

Profile of German Ecotourists

There is only one study no studies specifically on German ecotourists. However, significant insight can be gained into the German ecotourism market by analyzing a study prepared for the Canadian Tourism Commission (CTC), US Tourism Trade Industries/ International Trade Administration (TI) and the Secretaria de Turismo (Sectur) in Mexico in 1996, which was designed to provide practical and strategic marketing information on the German long haul pleasure travel market.

In as part of that study, a consumer survey was completed which included questions on the activities the consumer had participated in on their most recent trip. The surveys were first analyzed to identify the activities that made the trip different or unique. Then, those unique activities were clustered together to identify natural groupings of related activities, which together define the principal type of activity for that trip. For example, the defining activities for an arts and culture trip included arts and cultural attractions, visiting museums and galleries, dining in fine restaurants, and enjoying ethnic culture and events.

On the basis of the above analysis, travellers were divided into activity segments. These activity segments are useful in identifying specific groups of travellers with very focused areas of interest and provide insight into their demographics, trip characteristics, and travel motivations and preferences (Coopers & Lybrand, 1996a).

The study identified nine activity segments. For the purposes of the current study, the profiles of the activity segments were analysed to determine their potential for the ecotourism market. Potential is based primarily on the activity segments having travel motivations and product preferences that are compatible with ecotourism. Based on these criteria, two segments have been identified as having good potential for the Williams Lake Forest District. They are Nature Appreciation and History and Scenery. The profiles of travellers that comprise those two activity segments are briefly described below. They show many similarities to North American and UK ecotourists:

Sociodemographics – The sociodemographic profiles of the both the Nature Appreciation and History and Scenery segments are very similar to the profile of the North American ecotourist. The Nature Appreciation group tends to be middle aged, equally male and female, well educated, financially well off, white-collar workers. The History and Scenery travellers are slightly older than the Nature Appreciation segment, but are nonetheless active travellers. They tend to be equally male and female, married, well-educated, white-collar workers with good incomes.

Trip characteristics – Similar to the North American ecotourist, Nature Appreciation travellers are independent travellers, who tend to make their own travel arrangements and like to travel as couples or alone. Their average trip duration is longer than the research findings on the North American ecotourist, however this may be related to the longer vacations German workers enjoy as compared to North Americans (average is six weeks in Germany).

Although these individuals generally make their own travel arrangements, the History and Scenery traveller is more likely to purchase a travel package than is the Nature Appreciation traveller. Of all nine activity segments, History and Scenery travellers are the most likely to travel with the family.

The History and Scenery traveller's average trip duration is shorter than the Nature Appreciation segment, but still longer than the research findings on the North American ecotourist.

Travel Motivations – Insight into each activity segment's travel motivations is provided by the motivating factors for their last trip and their general travel motivations. Outdoors and wilderness enthusiasts, Nature Appreciation travellers are primarily motivated to travel so that they have the opportunity to experience all aspects of nature in a natural setting. The natural setting is particularly important to them, as is evidenced by their interest in natural ecological sites and protected lands.

In comparison, History and Scenery travellers are motivated to travel so they can experience local history and heritage in a scenic setting, with scenic meaning quaint towns and villages, the rural countryside and so forth. They are motivated to see a variety of heritage sites so that they can share their experiences with others when they get home.

Preferred Activities - The preferred activities of Nature Appreciation travellers revolve around nature and the natural setting. They enjoy visiting national parks and other protected areas as well as observing wildlife and bird watching. As is characteristic of ecotourists, these individuals are interested in learning while on vacation. In addition, this group is also interested in cultural activities, such as meeting native and ethnic groups, and in participating in adventure activities, such as diving and surfing.

The History and Scenery group enjoys activities involving historic places, heritage and culture, ethnic and aboriginal culture, city and rural sightseeing and remote coastal attractions.

Natural Resources

Climate

- Interior Continental climate
- Short, warm summer season (July to mid-September)
- Moderately cold, relatively dry winter season

Geography

- Major Landform Unit – Interior Plateau
- Landform Subunits - Fraser Plateau, Fraser Basin, Camelsfoot Range (northern portion), Chilcotin Ranges (eastern portion)
- Fraser Plateau portion - level to gently rolling landscape; elevations of 900-1500 metres
- Fraser Basin portion - low-relief, low lying plain covered by glacial till and glacial lake deposits
- Incorporates seven biogeoclimactic zones: Alpine Tundra, Bunchgrass, Englemann Spruce-Subalpine Fir, Interior Douglas Fir, Montane Spruce, Sub-Boreal Pine-Spruce Zone, and Sub-Boreal Spruce Zone

Vegetation

- Alpine Tundra Zone – Dwarf shrubs, herbs, lichens, mosses, wildflowers
- Bunchgrass Zone - Bluebunch Wheatgrass, big sagebrush
- Englemann Spruce-Subalpine Fir Zone (Very dry and cold, Big Creek variant) – Dominated by Lodgepole Pine; understory of Subalpine fir, Egelmann spruce; Common juniper, lupine, dwarf blueberry, arnica, ground lichens.
- Interior Douglas Fir Zone - Douglas fir, soopolallie, kinnikinnick (bearberry), Pinegrass and Feathermoss
- Montane Spruce Zone – Lodgepole pine, crowberry, grouseberry, feathermoss
- Sub-Boreal Spruce Zone – Douglas fir, Lodgepole pine, hybrid white spruce, Saskatoon berry, prickly rose, spirea, black huckleberry, false sarsaparilla, pinegrass
- Sub-Boreal Pine Zone – Lodgepole pine, white spruce, common juniper, kinnikinnick, pinegrass, lichens

Lakes and Rivers

- Include Fraser River, Chilcotin River, Williams Lake, McLeese Lake, Big Lake, Chimney Lake chain, Gaspard Lake

Wildlife

- Large mammals include mule deer, elk, California bighorn sheep, cougar, grizzly bear, moose, coyote, black bear, wolves
- Small mammals include red fox, lynx, bobcat, fisher, martin, weasel, yellow-bellied marmot, snowshoe hare, chipmunk, flying squirrel, beaver
- Birds include American white pelican, bluebird, golden eagle, bald eagle, owl, osprey, duck, geese, swan, hawk, falcon

Fish

- Sportfish include Sockeye salmon, Chinook salmon, Steelhead, Sturgeon, Cutthroat trout, Bull trout, Rainbow trout, Dolly Varden

Nature-based Attractions/Activities

Attractions

- Cariboo Educational Woodlot (Bull Mountain)
    - Trails, wildlife viewing structure and day use facilities
- Farwell Canyon
    - Badland formation 45 km southwest of Williams Lake in Chilcotin River Canyon
- Provincial Parks/ Protected Areas
    - Big Creek/South Chilcotin Provincial Park – wilderness campsites, wilderness hiking
    - Churn Creek Protected Area – grasslands, hiking, horseback riding, mountain biking
    - Junction Sheep Range Provincial Park – Interpretive displays, trails, wildlife viewing structure, hiking, cross country skiing, mountain biking
- McLeese Lake/Sheridan Creek
    - Trails, wildlife viewing structure and day use facilities
- Reidemann Wildlife Sanctuary (Alkali Lake)
    - Interpretive displays and bird watching structures
- Scout Island Nature Centre (Williams Lake)
    - Wildlife displays, nature trails and walkways
- Trails
    - Bull Mountain Trails – 19 km north of Williams Lake
    - De Sous Mountain Lookout – De Sous Road
    - Fox Mountain Bike Trail – Williams Lake
    - Knife Creek Mule Deer Trail – east end of Williams Lake
    - McLeese Lake/Sheridan Lake Trails
    - Minton Creek Walk – Bull Mountain; self-guided forest life cycle tour
    - Ravin Trail – Williams Creek Valley
    - Scout Island – Williams Lake
    - Silviculture Trail – Bull Mountain Road; 3 km trail through wet and dry sites
    - South Chilcotin Special Resource Development Zone (SRDZ) – wilderness trails
    - South Side Trail – south side of Williams Lake
    - Spokey Hollow Trail
    - Taseko Lake Special Resource Development Zone (SRDZ) – wilderness trails
    - UBC – Alex Fraser Research Centre at Knife Creek
    - Williams Lake River Valley – west end of Williams Lake to Fraser River
    - Ye Olde Boxe Trail – Trailhead 10 km south of Williams Lake

Activities

- Canoeing
    - Beaver Valley Lakes
    - Chimney Lake chain
    - McLeese Lake

  - San Jose River Valley
  - Williams Lake
- Cross Country Skiing
  - Bull Mountain Trails
  - Williams Lake River Valley
- Fishing
  - 84 lakes with sport fishing potential, including wild stock and stocked lakes
- Golf
  - Bell-E-Acres Recreation (Williams Lake)
  - Fireman's Fairways (Chimney Lake)
  - Putter's Mini-Golf
  - Williams Lake Golf Course (Williams Lake)
- Hiking
  - Big Creek Provincial Park
  - Bond Lake Trails
  - Bull Mountain Trails
  - Churn Creek Protected Area
  - De Sous Mountain Trail
  - Fox Mountain Trail (a.k.a. Jimmy's Fox Trail)
  - Junction Sheep Range Provincial Park
  - Ravin Trail
  - South Chilcotin Special Resource Development Zone (SRDZ) – Hungry Valley, Dash Valley, Lone Valley, Lone Cabin Valley
  - South Side Trails
  - Spokey Hollow Trail
  - Taseko Lake Special Resource Development Zone (SRDZ) – Groundhog Creek
  - UBC – Alex Fraser Research Centre at Knife Creek
  - Williams Lake River Valley Recreation Corridor
  - Ye Olde Boxe Trail
- Horseback Trail Riding
  - Big Creek Provincial Park
  - Churn Creek Protected Area
  - Junction Sheep Range Provincial Park
  - On horseback riding / hiking / biking trails
  - Chimney Valley
  - McLeese Lake area (west)
- Mountain Biking
  - Bond Lake Trails
  - Bull Mountain Trails
  - Dante's Inferno Trail

  - De Sous Mountain Trail
  - Fox Mountain Trail (a.k.a. Jimmy's Fox Trail)
  - Ravin Trail
  - South Side Trails
  - Spokey Hollow Trail
  - Ye Olde Boxe Trail
  - Junction Sheep Range Park (designated trails)
  - Churn Creek Protected Area (designated trails)
- Rockclimbing
  - Esler Bluff, limestone formation 13.5 km west of Williams Lake
  - Moon Road Bluff, 35 km west of Williams Lake
  - Alkali Bluff, 100 km south of Williams Lake
- Rockhounding
  - 4 km east of Williams Lake for Mariposite
  - 22 km southwest of Williams Lake for jasper, rhodonite, thulite, chert
- Snowmobiling
  - South Lakeside/Chimney Lake
- Walking
  - Bull Mountain Trails
  - Dante's Inferno Trail
  - Knife Creek Mule Deer Trail
  - Minton Creek Walk
  - Scout Island
  - South Lakeside
  - UBC – Alex Fraser Research Centre at Knife Creek
  - Williams Lake River Valley
- Whitewater Rafting/Canoeing
  - Fraser River from Soda Creek to Yale
  - Chilcotin-Fraser Rivers confluence
- Wildlife Viewing
  - Alkali Lake – Reidemann Wildlife Sanctuary –migrating waterfowl, American White Pelican, Long-billed Curlew, Trumpeter Swan, Tundra Swan
  - Becher's Pond - bluebirds
  - Cariboo Educational Woodlot (Bull Mountain) – Moose, Mule Deer
  - Junction Sheep Range Provincial Park – California Bighorn Sheep, Long-billed Curlew, Grouse
  - McLeese Lake/Sheridan Creek - spawning Kokanee
  - Scout Island Nature Centre –Red Fox, Muskrat, River Otter, Beaver, Milbert's Tortoiseshell Butterfly, Great Blue Heron

Culture-based Attractions/Activities

- Cariboo Friendship Society (Williams Lake)
  - Native arts and crafts, native décor dining
- Cowboy Culture
  - BC Cowboy Hall of Fame (Williams Lake) -
  - Gang Ranch – Canada's largest ranch; historic past, cookhouse, store and post office
  - Williams Lake Stockyards – livestock sales
- Native Longhouse (Williams Lake)
- Traditional and contemporary First Nations Activities
  - Salmon fishing (Farwell Canyon, Rudy Johnson's Bridge, Sheep Creek Bridge), hunting, berry picking, plant gathering, arts and crafts, song and dance
- Williams Lake Studio Theatre
- Xat'sull Heritage Village (Soda Creek)
  - Petroglyphs, cultural programs, tours, arts and crafts workshops, traditional foods, sweat lodges

Heritage-based Attractions/Activities

- Cariboo Gold Rush
  - Gold Rush Trail – from Fort Langley to Barkerville via Highways 1, 97 and 26 and Barkerville to Prince George via Highway 97; Kilby Loop, Lillooet Loop, Ashcroft and Likely Loop sidebars
  - Cariboo Waggon Road
- Museums
  - 153 Mile Store Museum –privately run; important stop on Cariboo Waggon Road
  - Museum of the Cariboo Chilcotin (Williams Lake) - indoor and outdoor displays focusing on cowboy, pioneer and aboriginal culture
  - Williams Lake Wildlife Historic Museum – 16 km north of Williams Lake; displays of BC game animals in natural settings
- Heritage Buildings and Sites
  - P.G.E. Railway Station now known as the Station House Gallery (Williams Lake)
  - Soda Creek Townsite – historic riverboat terminus
  - William Pinchbeck Grave (Williams Lake) – Williams Lake's first rancher
- Pioneer /cowboy settlement history
  - 1880s cattle droving
  - vestiges of Cariboo Waggon Road
  - vestiges of Fraser River pack trails

Industrial Tourism Attractions/Activities

- Logging Industry
  - Lignum Mill, Williams Lake – sawmill tours
  - Riverside Forest Products – customized forestry tours
  - Silviculture Trail – 3 km trail 19 km north of Williams Lake on Bull Mountain Road
  - NW Energy, Williams Lake – tours of electricity production from waste wood (hog fuel) tours

Events

- 2002 Winter Games
- Banff Blue Mountain Film Festival
- Bull Mountain Challenge – Cross Country Skiing
- Cariboots and Blades
- Forestry and Mining Show
- Halloween Fire Works Display
- Medieval Fair
- Tour de Cariboo Cycling Tour
- Traditional Pow Wow
- Williams Lake Cariboo Fall Fair
- Williams Lake High School Rodeo
- Williams Lake Indoor Rodeo
- Williams Lake Logger Sports
- Williams Lake Stampede
- Various Annual Sporting Events (Curling, Golf, Hockey, Ice Fishing)

Tour Routes

- Discovery Coast Passage Circle Tour
- Local Circle Tour Routes
  - Alkali Lake / Gang Ranch
  - Chimney Lakes
  - Riske Creek / Big Creek / Hanceville
  - Fraser River Tour
  - Sugarcane / Mission Road
  - Meldrum Creek / Soda Creek / MacAlister

Accommodation and Conference Facilities

Accommodation – Williams Lake & 150 Mile House

- 150 Road House
- Caesar Inn
- Country Vacation B&B
- Drummond Lodge Motor Inn
- Fraser Inn
- Jamboree Motel
- Lakeside Motel
- Overlander Hotel
- Rowat's B&B
- Sandman Inn
- Slumber Lodge
- Springhouse Trails Summer Resort
- Stampeder Motel
- Super 8 Motel
- Valleyview Motel

Accommodation – Big Creek

- Big Creek Lodge
- Rainbows End Ranch Log Cabin

Accommodation – Cuisson Lake

- Cuisson Lake Resort

Accommodation – McLeese Lake

- McLeese Lake Resort
- Oasis Resort

Accommodation – Riske Creek

- Chilcotin Lodge

Campgrounds

- Blue Lake Holiday Campground (Blue Lake)
- Chief Will-Yum Campsite (Williams Lake)
- Whispering Willows Campground and Store (Williams Lake)
- Wildwood Mobile Home and RV Park (Williams Lake)
- Williams Lake Stampede Campground (Williams Lake)
- 20 Ministry of Forests Recreation sites

Conference Facilities – Williams Lake

- Cariboo Memorial Complex (2 arenas and Gibraltar Room)
- Ceasar's Inn
- Fraser Inn
- Overlander Hotel

Transportation Infrastructure and Services

Highways

- Highway 97 – BC interior's major route; connects Williams Lake with northern and southern parts of the province
- Highway 20 connects Williams Lake with Bella Coola and Pacific Ocean

Air Service

- Scheduled service – daily flights northbound from Vancouver via Quesnel to Williams Lake and southbound Williams Lake to Vancouver direct
- Fixed wing and helicopter charter services
- Float base on Williams Lake

Bus Services

- Greyhound – north and south departures via Highway 97 from Williams Lake to Prince George and Vancouver and waypoints

Rail Service

- BC Rail's Cariboo Prospector three times per week to North Vancouver and Prince George

Car Rental

- Budget Car and Truck Rental (Williams Lake)
- National-Tilden Car Rental (Williams Lake)

Charters/Tours/Services

Air Charters/Tours

- Highland Helicopters
- Inter-Link Air
- Lawrence Aviation
- Sharp Wings Ltd

Recreation Equipment Rentals

- Caribou Ski Source for Sports
- Red Shred's Bike & Board Shed

Art Galleries

- Reflections North Gallery
- Station House Gallery

Fishing Charters

- Legends Rod Company & The Fly Shop
- Pyna-Tee-Ah Outdoor Adventures

Guide Outfitters

- Amedee Isnardy
- Churn Creek Outfitters
- Clark & Gay Saugstad
- Darryl Buchholtz
- Daryl McComb
- Fraser Plateau Guide Outfitters
- Karl Burch
- Skelton Valley Guide & Outfitter
- Trembling Pines Outfitter
- Whispering Pine Outfitters

Land Tours/Charters

- BC Llama Treks – horse and trail
- Butterfield & Robinson – river rafting
- Canadian River Expeditions – river rafting
- Cariboo Chilcotin Jet Boat Adventures – jet boating
- Chilko Coate – hiking/mountain/nature
- Chilko River Expeditions – river rafting
- Hyak Wilderness Adventures – river rafting
- Red Shred's Bike & Board Shed – cycling/hiking/mountain/nature/ski touring
- Rivers, Oceans and Mountains – river rafting
- Rustic Tours – bus/van tours
- Springhouse Trails Summer Resort– horse and trail
- Tatanka Ranch – horse and trail
- Teepee Hart Ranch – horse and trail
- Turagain Ventures – horse and trail
- Vedan Ranch – horse and trail
- Waterpeople Expeditions – river rafting

Tourist Information

- Williams Lake Visitor InfoCentre

Williams Lake Infocentre Visitation - Registered Visitors: 1998-2000

	1998	1999		2000
Visitation			***Visitation***	
Registered parties	10,312	9,174	Registered parties	8,574
Registered visitors	17,160	15,049	Registered visitors	14,176
Registered tour buses	1	8	Registered tour buses	12
Visitor Origin			***Visitor Origin***	
BC	69%	67%	Other BC	42%
Regional	14%	12%	Local Resident	28%
North America	5%	7%	Europe	14%
Europe	11%	14%	Other US/Mexico	5%
Asia	1%	1%	Other Canada	4%
Other	**	**	Alberta	3%
			Washington	2%
			California	1%
			Asia/Australia	1%
			Other	1%
Visitor Destinations*				
Williams Lake	28%	31%		
Local Tourism Region	28%	25%		
Other BC Community	7%	9%		
Multiple Destinations in BC	31%	30%		
Outside BC	5%	5%		
Length of Stay (nights)			***Length of Stay (nights)***	
Same day	39%	42%	Same day	46%
1 - 3	29%	28%	1 - 3	47%
4 - 7	5%	5%	4 - 6	3%
8 - 14	1%	2%	7 - 13	1%
15+	26%	22%	14+	4%
Total Trip Length in BC*				
Same day	3%	1%		
1-3	3%	3%		
4-7	5%	8%		
8-14	8%	15%		
15+	81%	73%		
Main Trip Purpose*				
Sightseeing	38%	38%		
Visiting Friends & Relatives	9%	9%		
Outdoors/Wilderness Activities	27%	20%		
Cultural Events/Fairs/Festivals	5%	3%		
Sports Events/Tournaments	1%	2%		
Business/Professional	10%	11%		
Shopping	4%	6%		
Personal Matters/Other	8%	16%		
Personal Matters/Other	8%	16%		

** beginning in 2000 info not collected*

*** less than 1%*

**** Includes Transportation, Community Services, Investment/Moving, Facilities/Washrooms, Misc*

Source: Tourism BC *Visitor InfoNetwork* Statistics Program

Appendix I1:
Tourism Opportunities Preliminary Assessment Matrix

Preliminary Evaluation Criteria

Resource Criteria

QT = **Quantity** of land/ other resources associated with tourism product/ activity
QL = **Quality** of land/ other resources associated with tourism product/ activity
A = **Accessibility** of land/ other resources associated with tourism product/ activity
S = **Seasons** in which tourism product/ activity offered

Market Criteria

E = Appeal of tourism product/ activity to **existing** market
T = **Trends** toward increased market demand for tourism product/ activity
P = **Potential** of tourism product/ activity to attract new visitors or lengthen stay in area
O = **Origin** of visitors attracted by tourism product/ activity where BC = 1, Regional Canada/ US = 2, Other Canada/ US = 3, and International = 4

Economic Criteria

JC = **Job creation** potential of tourism product/ activity
JD = **Job duration** (seasonality) of jobs created by tourism product/ activity
R = **Revenue** potential of tourism product/ activity
I = Employment **income** (direct and indirect) potential of tourism product/ activity

Social and Community Criteria

TC = **Compatibility** of tourism product/ activity with other **tourism** activities in area
OC = **Compatibility** of tourism product/ activity with **other** (non-tourism) activities in area

Preliminary Evaluation Criteria Ranking

1 = Poor
2 = Average
3 = Good
4 = Excellent

Tourism Opportunities Preliminary Evaluation Matrix

Resource Criteria				Market Demand				Economic Criteria				Social & Community Criteria		Total
Ecotourism/ Adventure Tourism/ Outdoor Recreation – Land-based														
Scenic Driving Tours														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
2	3	3	2	4	2	3	4	1	2	1	1	4	3	35
ATV Tours														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
2	4	2	2	1	2	3	2	1	2	1	2	2	2	28
Campground														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
1	3	3	2	4	4	3	2	2	2	2	2	4	3	37
Destination Lodge														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
1	3	3	4	3	4	4	4	3	3	3	3	3	3	44
4X4 Tours														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
2	3	3	2	1	2	2	4	1	2	1	1	2	3	29
Hiking														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
4	4	3	2	4	4	4	4	2	2	2	2	4	3	44
Mountain Biking														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
4	4	3	3	2	4	4	2	2	2	2	2	3	3	40
Rockclimbing														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
2	2	3	2	2	2	1	1	1	2	1	1	4	4	28
Trail Network														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
4	4	3	4	4	4	4	4	2	2	2	2	4	3	46
Horseback Trail Riding														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
4	4	3	2	4	3	3	4	2	2	2	2	3	3	41
Nature Observation														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
3	3	3	3	4	4	3	4	2	3	2	2	4	3	43
Ecotourism/ Adventure Tourism/ Outdoor Recreation – Winter Land-based														
Cross-country Skiing														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
2	3	2	1	1	3	2	1	1	1	1	1	4	3	26
Iceclimbing														
QT	**QL**	**A**	**S**	**E**	**T**	**P**	**O**	**JC**	**JD**	**R**	**I**	**TC**	**OC**	**Total**
1	1	2	1	1	2	1	1	1	1	1	1	4	4	22

Resource Criteria				Market Demand				Economic Criteria				Social & Community Criteria		Total
Snowmobiling														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	3	3	1	1	3	4	4	2	1	2	2	2	3	33
Snowshoeing														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
4	3	3	1	1	3	2	2	1	1	1	1	4	4	31
Ecotourism/ Adventure Tourism/ Outdoor Recreation –Water –based														
Canoeing/ Kayaking (flat water)														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	3	3	2	1	3	1	1	1	2	1	1	4	4	29
Freshwater Fishing														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
4	4	3	2	3	4	3	4	3	2	3	2	3	2	42
Riverboat Tours														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
1	4	4	1	3	3	3	4	1	1	2	1	4	4	36
Whitewater Rafting/ Canoeing/ Kayaking														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	4	2	1	2	3	2	4	1	1	2	1	4	3	32
Aboriginal Tourism														
Xats'ull Heritage Village														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
1	3	3	3	2	3	3	4	2	3	2	2	4	3	40
Aboriginal Interpretive/ Experiential Programs														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
4	3	3	3	2	3	3	4	2	3	2	2	4	3	41
Western / Gold Rush Heritage / Cultural Tourism														
Working Ranch Experiences														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
4	4	3	4	2	2	2	4	2	2	2	2	3	3	39
Rodeos														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
3	2	2	2	2	1	1	4	1	2	1	1	4	3	29
Western Theme Interpretive/ Experiential Programs														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
4	4	3	2	3	3	3	4	2	2	2	2	4	3	41
Gold Rush Theme Interpretive/ Experiential Programs														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	3	3	2	3	3	3	3	1	2	1	1	4	3	34
Industrial Tourism														
Mine Tours														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	2	2	4	1	1	1	1	1	4	1	1	3	3	27
Forestry Industry Interpretive Tours														
QT	QL	A	S	E	T	P	O	JC	JD	R	I	TC	OC	Total
2	3	3	2	1	1	1	2	1	3	2	2	3	3	31

Appendix I2: Travel Trade Assessment of Tourism Opportunities

Tourism Product/Activity	Resource Assessment	Existing Mkt Demand	Future Mkt Trends	FD's Visitor Potential	Total Score
Horseback Trail Riding					
BC Rail	4	4	4	4	16
Benno's Adventure Tours	4	3	4	3	14
Greyhound Vacations	3	3	3	3	12
Jonview Tours	3	2	2	2	9
Pacific Spirit Tours	4	3	3	3	13
SNV International	3	3	3	3	12
Average Score					***12.7***
Riverboat Tours					
BC Rail	3	3	3	3	12
Benno's Adventure Tours	4	4	4	4	16
Greyhound Vacations	3	3	4	4	14
Jonview Tours	3	2	2	2	9
Pacific Spirit Tours	4	3	3	3	13
SNV International	3	3	3	3	12
Average Score					***12.7***
Western Theme Tourism					
BC Rail	4	4	4	4	16
Benno's Adventure Tours	4	3	3	3	13
Greyhound Vacations	4	2	3	3	12
Jonview Tours	2	2	2	2	8
Pacific Spirit Tours	4	3	2	3	12
SNV International	4	3	3	3	13
Average Score					***12.3***
Working Ranch Experiences					
BC Rail	4	2	3	2	11
Benno's Adventure Tours	3	3	3	4	13
Greyhound Vacations	4	3	3	3	13
Jonview Tours	3	2	3	3	11
Pacific Spirit Tours	4	3	3	3	13
SNV International	3	3	3	3	12
Average Score					***12.2***
Destination Lodge					
BC Rail	3	3	3	3	12
Benno's Adventure Tours	3	3	4	4	14
Greyhound Vacations	3	3	4	4	14
Jonview Tours	2	1	1	1	5
Pacific Spirit Tours	3	3	3	3	12
SNV International	3	4	4	4	15
Average Score					***12***
Nature Observation					
BC Rail	2	2	2	2	8
Benno's Adventure Tours	2	4	4	2	12
Greyhound Vacations	2	3	4	4	13
Jonview Tours	2	3	3	3	11
Pacific Spirit Tours	2	3	3	2	10
SNV International	3	4	4	3	14
Average Score					***11.3***
Forestry Industry Interpretive Programs					
BC Rail	4	3	3	3	13
Benno's Adventure Tours	4	3	2	2	11
Greyhound Vacations	4	4	4	4	16

Appendix I2: Travel Trade Assessment of Tourism Opportunities

Tourism Product/Activity	Resource Assessment	Existing Mkt Demand	Future Mkt Trends	FD's Visitor Potential	Total Score
Jonview Tours	4	2	2	2	10
Pacific Spirit Tours	4	1	1	1	7
SNV International	3	2	2	2	9
Average Score					***11.0***
Aboriginal Tourism					
BC Rail	3	3	3	3	12
Benno's Adventure Tours	3	2	2	4	11
Greyhound Vacations	4	3	4	4	15
Jonview Tours	2	1	1	1	5
Pacific Spirit Tours	3	2	2	2	9
SNV International	3	2	2	2	9
Average Score					***10.2***
Mountain Biking					
BC Rail	3	1	1	1	6
Benno's Adventure Tours	4	2	3	3	12
Greyhound Vacations	4	2	3	3	12
Jonview Tours	3	1	1	1	6
Pacific Spirit Tours	3	3	3	3	12
SNV International	3	3	3	3	12
Average Score					***10***
Campground					
BC Rail	2	1	1	1	5
Benno's Adventure Tours	3	4	4	4	15
Greyhound Vacations	1	3	4	4	12
Jonview Tours	2	1	1	1	5
Pacific Spirit Tours	4	3	3	3	13
SNV International	2	2	2	3	9
Average Score					***9.8***
Scenic Driving Tours					
BC Rail	3	1	1	1	6
Benno's Adventure Tours	3	2	2	2	9
Greyhound Vacations	3	3	3	3	12
Jonview Tours	3	2	2	2	9
Pacific Spirit Tours	3	3	3	3	12
SNV International	2	3	3	3	11
Average Score					***9.8***
Xats'ull Heritage Village					
BC Rail	3	3	3	3	12
Benno's Adventure Tours	2	2	2	4	10
Greyhound Vacations	3	3	4	4	14
Jonview Tours	2	2	2	2	8
Pacific Spirit Tours		2	2	2	6
SNV International	2	2	2	2	8
Average Score					***9.7***
Trail Network					
BC Rail	3	1	1	1	6
Benno's Adventure Tours	4	4	4	4	16
Greyhound Vacations	2	3	4	3	12
Jonview Tours	2	1	1	1	5
Pacific Spirit Tours	2	1	1	1	5
SNV International	4	2	3	3	12
Average Score					***9.3***

Appendix I2: Travel Trade Assessment of Tourism Opportunities

Tourism Product/Activity	Resource Assessment	Existing Mkt Demand	Future Mkt Trends	FD's Visitor Potential	Total Score
Freshwater Fishing					
BC Rail	3	1	1	1	6
Benno's Adventure Tours	4	1	1	1	7
Greyhound Vacations	4	2	2	2	10
Jonview Tours	3	1	1	1	6
Pacific Spirit Tours	3	2	3	3	11
SNV International	4	4	4	4	16
Average Score					***9.3***
Snowmobiling					
BC Rail	1	1	1	1	4
Benno's Adventure Tours	2	3	3	2	10
Greyhound Vacations	2	2	2	2	8
Jonview Tours	1	1	1	1	4
Pacific Spirit Tours	3	3	3	3	12
SNV International	2	3	3	3	11
Average Score					***8.2***
Hiking					
BC Rail	1	1	1	1	4
Benno's Adventure Tours	3	2	4	3	12
Greyhound Vacations	3	2	3	3	11
Jonview Tours	2	1	1	1	5
Pacific Spirit Tours	2	1	1	1	5
SNV International	3	2	3	3	11
Average Score					***8***

Appendix J1:
Tourism Opportunities Assessment Criteria

Resource Criteria

Quantity of Associated Resource – refers to the quantity available in the study area of the physical or human resource(s) required to undertake the activity / product

Low (L): No / little of resource exists

Moderate (M): Moderate level of resource exists

High (H): High level of resource exists

Quality of Resource – refers to the quality available in the study area of the physical or human resource(s) required to undertake the activity / product

Low (L): Sub-standard level of quality

Moderate (M): Acceptable level of quality

High (H): High level of quality

Optimal Resource Units – refers to the specific sub-zones in the study area having best potential for the tourism product / activity (see **Appendix J.2**)

BV - Beaver Valley

WL - Williams Lake

P - Palmer

Gr - Grasslands

Ga - Gaspard

TL - Taseko Lake

SC - South Chilcotin

Regional Quantity of Resource –refers to the quantity available in the study area, as compared to other areas of BC, of the physical or human resource(s) required to undertake the activity / product

Low (L): No / little of resource exists compared to other areas of BC

Moderate (M): Moderate level of resource exists compared to other areas of BC

High (H): High level of resource exists compared to other areas of BC

Quality of Resource – refers to the quality in the study area, as compared to other areas of BC, of the physical or human resource(s) required to undertake the activity / product

Low (L): Much lesser level of quality

Moderate (M): Somewhat lesser level of quality

High (H): Similar to or better level of quality

Product Frequency in Region - refers to number of operators providing the activity / product in the study area on a commercial basis. This assessment is based on the tourism operators database prepared by Clover Point Cartographics.

Low (L): No operators providing activity / product

Moderate (M): A few operators providing activity / product

High (H): Many operators providing activity / product

Supporting infrastructure - refers to whether activity / product specific infrastructure exists in the study area

Low (L): All / most infrastructure does not exist

Moderate (M): Some infrastructure exists

High (H): All / most infrastructure exists

Government Policy and Planning Criteria

Tenure / licensing / permits / other requirements – identifies whether the tourism product / activity may require provincial or federal tenures if pursued on Crown lands

Yes – Provincial or federal tenures likely to be required

No – Provincial or federal tenures not likely to be required

Market Criteria

Appeal to existing markets – refers to how much the tourism product / activity appeals to the study area's existing tourism markets

Low (L): Not very appealing

Moderate (M): Somewhat appealing

High (H): Highly appealing

Market growth trends – refers to trends towards increased market demand for the tourism product / activity

Low (L): No growth in market demand

Moderate (M): Some growth in market demand

High (H): Rapid growth

Origin of potential visitors – refers to main source markets of visitors attracted by the tourism product/activity, namely:

BC: British Columbia

NA: North America

I: International

Compatibility with other products – refers to whether the product / activity can be packaged with and is compatible with the other activities / products

Low (L): Not compatible with most other activities / products

Moderate (M): Somewhat compatible with most other activities / products

High (H): Highly compatible with most other activities / products

Seasonality – refers to number of seasons in which participation in an activity / product is likely to occur

Low (L): Activity / product occurs mainly in one season (e.g., summer or winter)

Moderate (M): Activity / product occurs in more than one season

High (H): Year-round activity / product

Economic Criteria

Revenue potential – refers to potential level of annual revenue from the operation of the tourism product / activity, as a function of anticipated patronage levels, average daily expenditures, duration and seasonality of use and subject to general market conditions and standard business practices

Low (L): Limited revenue potential from operations anticipated

Moderate (M): Moderate revenue potential from operations anticipated

High (H): Strong revenue potential from operations anticipated

Employment potential – reflects the number and nature of jobs likely to be generated by the tourism product / activity (from operations more so than construction or development), taking into account such factors as types of jobs created, full time vs. part time and year round vs. seasonal basis of jobs, associated salary / income levels and whether the tourism product / activity can both readily employ local residents and generate additional employment opportunities in the District

Low (L): Limited employment potential from operations

Moderate (M): Moderate employment potential from operations

High (H): Strong employment potential from operations

Capital requirements – reflects the initial outlay of funds needed to develop the tourism product / activity to the required market standard and scale as well as the annual operating expenses likely to be incurred to operate, maintain and market the tourism product / activity during its initial start up period and once fully operational (as compared with annual operating revenues)

Low (L): Low level of funds required for development and / or operations

Moderate (M): Moderate level of funds required for development and / or operations

High (H): High level of funds required for development and / or operations

Social and Community Criteria

Compatibility with local recreation and community uses – refers to the extent to which the tourism product / activity is generally compatible with other recreation and community uses of the resource(s) required or present in the District, considering the degree to which potential conflicts, concerns and capacity constraints might exist and be successfully addressed

Low (L): Not compatible with most other local recreation and community uses

Moderate (M): Somewhat compatible with most other local recreation and community uses

High (H): Highly compatible with most other local recreation and community uses

Compatibility with other economic uses – refers to the extent to which the tourism product / activity is generally compatible with other economic uses of the resource(s) required or present in the District, considering the degree to which potential conflicts, concerns and capacity constraints might exist and be successfully addressed

Low (L): Not compatible with most other economic uses

Moderate (M): Somewhat compatible with most other economic uses

High (H): Highly compatible with most other economic uses

Community acceptance / economic development support potential – refers to the likely level of acceptance by the local community for the tourism product / activity as well as the likely level of local economic development support, taking into account whether the project would fit with the community's economic development goals and objectives, whether similar initiatives are already underway, planned or under consideration for the future and whether the community would generally support local or outside proponents for the tourism products / activities

Low (L): Limited community acceptance, economic development support anticipated

Moderate (M): Moderate community acceptance, economic development support anticipated

High (H): Strong community acceptance, economic development support anticipated

Local skills availability – refers to the general availability (in terms of number of jobs and associated skills) among the local labour force to provide the required labour component to operate the specific tourism product / activity and hence the extent to which positions must be filled with outside labour and training must be provided

Low (L): No or limited availability of qualified labour locally

Moderate (M): Moderate availability of qualified labour locally

High (H): Abundant availability of qualified labour locally

Appendix J2:
Tourism Opportunities Optimal Locations Assessment

For the purposes of identifying the optimal locations for each of the ten shortlisted tourism opportunities, the Williams Lake study area was divided into seven sub-zones. The sub-zone boundaries generally correspond to the Resource Development Zones created by the Cariboo-Chilcotin Land Use Plan. However, they differ in that the three protected areas within the Forest District are included within the sub-zones instead of being stand-alone units, as they are in CCLUP. The protected areas are incorporated into the sub-zones as follows:

- Big Creek Park included in Taseko Lake sub-zone
- Junction Sheep Range Park included in Grasslands sub-zone
- Churn Creek Protected Area included in South Chilcotin sub-zone

A map showing the boundaries of the sub-zones is attached at the end of this appendix.

A set of locational criteria has been used to evaluate the potential of the sub-zones within the Williams Lake study area for each of the tourism opportunities. Each of these criteria has been assigned a "weight" which reflects the relative importance of that factor to the viability of each of the tourism opportunities within the study area. A four-point scale ranging from 0 = not important to 3 = very important is used to identify the significance of these criterion in the context of each opportunity.

To determine the optimal locations for each of the tourism opportunities identified in this study, each of the aforementioned weighted criterion is assessed as to their relative presence within each of the seven Williams Lake study area sub-zones. The relative presence of each criterion was determined based on the mapping performed by Clover Point Cartographics, additional map data layers and information contained in the Cariboo-Chilcotin Land Use Plan documents (see **Section 3.2.1**). Scores ranging from 3 = high, 2 = moderate, to 1 = limited levels of presence have been used to describe the relative presence of the each criterion within each sub-zone.

The overall potential for various opportunities within each sub-zone is based on the cumulative combination of the relative presence of each criteria within the sub-zone multiplied by the relative importance of that factor.

The design of the matrix is intended to assist with the development of tourism packages (combinations of activities/products). For example, where different but complementary tourism opportunities have high ratings within a specific sub-zone, packaging options based on overriding themes should be considered. By combining these opportunities within high potential sub-zones, the attractiveness of the tourism package and the viability of all of the business functions within the package can be enhanced.

The evaluative matrix included in this report provides: the weighting criteria developed for each of the ten short-listed tourism opportunities; the raw scores or relative presence of each criterion within each sub-zone; and, for each individual opportunity, the weighted score by sub-zone for each criterion and the total scores for each sub-zone.

It is important to note that due to differences in locational criteria across products/activities (e.g., fewer weighting factors for fishing) the scores for sub-zones can only be compared for each individual activity/product.

Based on the locational criteria assessment, the top ranking sub-zones for each tourism opportunity is shown in the table following:

Activity #	Activity/Product	Highest Score
1	Destination Lodge	Williams Lake
2	Western Theme Tourism	Williams Lake
3	Freshwater Fishing	Williams Lake
4	Horseback Trail Riding	Taseko Lake
5	Mountain Biking	Williams Lake
6	Hiking	Taseko Lake
7	Nature Observation	Taseko Lake
8	Winter Tourism	Williams Lake
9	Scenic Driving Tours	Williams Lake

Considering scores for each opportunity indicates that the Williams Lake sub-zone provides the greatest potential for most tourism. Further commentary on the optimal sub-zones for each tourism opportunity is provided in **Section 7.2**.

Sub-zone	Activity #								
	1	2	3	4	5	6	7	8	9
Beaver Valley	125	93	54	65	54	86	85	122	97
Gaspard	94	65	45	61	51	78	81	100	82
Grasslands	124	88	59	69	54	94	92	119	98
Palmer	91	65	45	59	50	80	81	100	80
South Chilcotin	123	85	52	77	63	105	97	129	96
Taseko Lake	122	85	59	78	64	109	102	132	100
Williams Lake	150	108	61	75	65	100	94	137	112

Williams Lake Forest District TOS - Optimal Locations Assessment

	Weighting Factor for Activity/Product*										Raw Score by Sub-zone						
Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**		**BV**	**WL**	**P**	**Gr**	**Ga**	**TL**	**SC**
1. Geographic setting and resources																	
scenic views and attractions	3	3	1	3	1	3	3	3	3		3	3	2	2	2	3	3
mid-country (somewhat remote)	3	1	1	2	2	2	2	2	2		2	2	3	3	3	3	3
back-country (remote)	0	0	1	1	2	3	2	1	0		1	2	1	2	1	3	3
abundant and varied wildlife	2	2	3	2	0	2	3	3	3		2	2	2	3	2	3	2
varied and scenic topography	2	2	1	3	2	2	3	3	2		2	2	2	2	2	3	3
alpine environments	2	0	0	1	2	2	1	3	2		2	2	2	1	1	3	3
proximity to rivers	3	2	3	1	0	1	2	0	2		2	3	1	3	2	2	2
proximity to lakes	3	2	3	1	0	1	2	1	2		3	2	2	1	1	1	1
proximity to open/rolling lands	0	3	0	2	0	1	1	3	2		3	3	3	3	3	2	3
2. Land uses																	
proximity to parks or protected area	3	1	2	1	0	3	3	3	2		1	1	2	3	2	3	3
close proximity to logged areas	0	0	0	0	1	0	2	1	0		3	3	3	3	3	3	2
distance from logged areas	3	1	1	2	1	3	2	2	2		2	2	2	2	1	3	2
access to non-commercial side roads	0	0	1	1	3	3	2	2	3		3	3	2	2	1	2	1
limited facility development	1	0	1	1	2	3	3	2	2		1	1	3	2	3	3	3
3. Tourist activities																	
proximity to varied winter activities	2	2	0	0	0	0	0	3	0		3	3	2	2	2	3	3
potential for diversified activity packages	3	2	0	0	0	0	0	3	1		3	3	1	2	1	2	2
potential for year-round activities	3	2	0	0	0	0	0	3	1		3	3	2	2	2	3	3
proximity to cultural features/activities	3	2	0	1	0	2	0	3	2		2	3	1	3	1	3	3
proximity to camping or huts	0	2	2	2	2	3	2	1	1		3	3	2	2	1	3	3
4. Services and amenities																	
proximity to skilled labour source	3	2	0	0	0	0	0	0	0		2	3	1	2	1	1	1
proximity to extensive trail system	3	1	1	3	3	3	3	2	1		1	2	1	2	1	2	3
potential for circular trail/route development	1	0	0	3	3	3	2	2	3		1	2	1	1	3	1	1
abundant good quality off-highway roads	1	1	2	1	1	2	2	2	2		3	3	2	2	3	1	1
proximity to full service population centre	2	1	0	0	0	0	1	2	2		2	3	1	2	1	1	1
all weather road access	3	2	2	1	2	1	1	3	2		2	3	1	2	2	1	1
proximity to major highway access	3	1	0	0	1	1	0	1	3		2	3	1	2	1	1	2
proximity to airports	2	0	0	0	0	0	0	0	0		2	3	1	2	2	1	1
proximity to other public transport	2	1	0	0	0	0	0	1	0		2	3	1	1	1	1	1
access to power grid utilities	3	3	0	0	0	0	0	0	0		2	3	1	2	1	1	1

* *Refers to importance of criterion to viability of tourism activity/product*
Ranking scale: 0 = not important, 1 = somewhat important, 2 = important, 3 = very important

** *Refers to relative level of presence of criterion in sub-zone*
Ranking scale: 1 = limited, 2 = moderate, 3 = high

Activity/Product Key:

1 = Destination Lodge
2 = Western Theme Tourism
3 = Freshwater Fishing
4 = Horseback Trail Riding
5 = Mountain Biking
6 = Hiking
7 = Nature Observation
8 = Winter Tourism
9 = Scenic Driving Tours

Sub-zone Key:

BV = Beaver Valley
WL = Williams Lake
P = Palmer
Gr = Grasslands
Ga = Gaspard
TL = Taseko Lake
SC = South Chilcotin

Williams Lake Forest District TOS - Optimal Locations Assessment

	BV (Beaver Valley) Sub-zone									WL (Williams Lake) Sub-zone								
	Score for Activity/Product									Activity/Product								
Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1. Geographic setting and resources																		
scenic views and attractions	9	9	3	9	3	9	9	9	9	9	9	3	9	3	9	9	9	9
mid-country (somewhat remote)	6	2	2	4	4	4	4	4	4	6	2	2	4	4	4	4	4	4
back-country (remote)	0	0	1	1	2	3	2	1	0	0	0	2	2	4	6	4	2	0
abundant and varied wildlife	4	4	6	4	0	4	6	6	6	4	4	6	4	0	4	6	6	6
varied and scenic topography	4	4	2	6	4	4	6	6	4	4	4	2	6	4	4	6	6	4
alpine environments	4	0	0	2	4	4	2	6	4	4	0	0	2	4	4	2	6	4
proximity to rivers	6	4	6	2	0	2	4	0	4	9	6	9	3	0	3	6	0	6
proximity to lakes	9	6	9	3	0	3	6	3	6	6	4	6	2	0	2	4	2	4
proximity to open/rolling lands	0	9	0	6	0	3	3	9	6	0	9	0	6	0	3	3	9	6
2. Land uses																		
proximity to parks or protected area	3	1	2	1	0	3	3	3	2	3	1	2	1	0	3	3	3	2
close proximity to logged areas	0	0	0	0	3	0	6	3	0	0	0	0	0	3	0	6	3	0
distance from logged areas	6	2	2	4	2	6	4	4	4	6	2	2	4	2	6	4	4	4
access to non-commercial side roads	0	0	3	3	9	9	6	6	9	0	0	3	3	9	9	6	6	9
limited facility development	1	0	1	1	2	3	3	2	2	1	0	1	1	2	3	3	2	2
3. Tourist activities																		
proximity to varied winter activities	6	6	0	0	0	0	0	9	0	6	6	0	0	0	0	0	9	0
potential for diversified activity packages	9	6	0	0	0	0	0	9	3	9	6	0	0	0	0	0	9	3
potential for year-round activities	9	6	0	0	0	0	0	9	3	9	6	0	0	0	0	0	9	3
proximity to cultural features/activities	6	4	0	2	0	4	0	6	4	9	6	0	3	0	6	0	9	6
proximity to camping or huts	0	6	6	6	6	9	6	3	3	0	6	6	6	6	9	6	3	3
4. Services and amenities																		
proximity to skilled labour source	6	4	0	0	0	0	0	0	0	9	6	0	0	0	0	0	0	0
proximity to extensive trail system	3	1	1	3	3	3	3	2	1	6	2	2	6	6	6	6	4	2
potential for circular trail/route development	1	0	0	3	3	3	2	2	3	2	0	0	6	6	6	4	4	6
abundant good quality off-highway roads	3	3	6	3	3	6	6	6	6	3	3	6	3	3	6	6	6	6
proximity to full service population centre	4	2	0	0	0	0	2	4	4	6	3	0	0	0	0	3	6	6
all weather road access	6	4	4	2	4	2	2	6	4	9	6	6	3	6	3	3	9	6
proximity to major highway access	6	2	0	0	2	2	0	2	6	9	3	0	0	3	3	0	3	9
proximity to airports	4	0	0	0	0	0	0	0	0	6	0	0	0	0	0	0	0	0
proximity to other public transport	4	2	0	0	0	0	0	2	0	6	3	0	0	0	0	0	3	0
access to power grid utilities	6	6	0	0	0	0	0	0	0	9	9	0	0	0	0	0	0	0
Activity #	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
Total Score:	125	93	54	65	54	86	85	122	97	150	106	58	74	65	99	94	136	110

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	P (Palmer) Sub-zone Score for Activity/Product									Gr (Grasslands) Sub-zone Score for Activity/Product								
Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1. Geographic setting and resources																		
scenic views and attractions	6	6	2	6	2	6	6	6	6	6	6	2	6	2	6	6	6	6
mid-country (somewhat remote)	9	3	3	6	6	6	6	6	6	9	3	3	6	6	6	6	6	6
back-country (remote)	0	0	1	1	2	3	2	1	0	0	0	2	2	4	6	4	2	0
abundant and varied wildlife	4	4	6	4	0	4	6	6	6	6	6	9	6	0	6	9	9	9
varied and scenic topography	4	4	2	6	4	4	6	6	4	4	4	2	6	4	4	6	6	4
alpine environments	4	0	0	2	4	4	2	6	4	2	0	0	1	2	2	1	3	2
proximity to rivers	3	2	3	1	0	1	2	0	2	9	6	9	3	0	3	6	0	6
proximity to lakes	6	4	6	2	0	2	4	2	4	3	2	3	1	0	1	2	1	2
proximity to open/rolling lands	0	9	0	6	0	3	3	9	6	0	9	0	6	0	3	3	9	6
2. Land uses																		
proximity to parks or protected area	6	2	4	2	0	6	6	6	4	9	3	6	3	0	9	9	9	6
close proximity to logged areas	0	0	0	0	3	0	6	3	0	0	0	0	0	3	0	6	3	0
distance from logged areas	6	2	2	4	2	6	4	4	4	6	2	2	4	2	6	4	4	4
access to non-commercial side roads	0	0	2	2	6	6	4	4	6	0	0	2	2	6	6	4	4	6
limited facility development	3	0	3	3	6	9	9	6	6	2	0	2	2	4	6	6	4	4
3. Tourist activities																		
proximity to varied winter activities	4	4	0	0	0	0	0	6	0	4	4	0	0	0	0	0	6	0
potential for diversified activity packages	3	2	0	0	0	0	0	3	1	6	4	0	0	0	0	0	6	2
potential for year-round activities	6	4	0	0	0	0	0	6	2	6	4	0	0	0	0	0	6	2
proximity to cultural features/activities	3	2	0	1	0	2	0	3	2	9	6	0	3	0	6	0	9	6
proximity to camping or huts	0	4	4	4	4	6	4	2	2	0	4	4	4	4	6	4	2	2
4. Services and amenities																		
proximity to skilled labour source	3	2	0	0	0	0	0	0	0	6	4	0	0	0	0	0	0	0
proximity to extensive trail system	3	1	1	3	3	3	3	2	1	6	2	2	6	6	6	6	4	2
potential for circular trail/route development	1	0	0	3	3	3	2	2	3	1	0	0	3	3	3	2	2	3
abundant good quality off-highway roads	2	2	4	2	2	4	4	4	4	2	2	4	2	2	4	4	4	4
proximity to full service population centre	2	1	0	0	0	0	1	2	2	4	2	0	0	0	0	2	4	4
all weather road access	3	2	2	1	2	1	1	3	2	6	4	4	2	4	2	2	6	4
proximity to major highway access	3	1	0	0	1	1	0	1	3	6	2	0	0	2	2	0	2	6
proximity to airports	2	0	0	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0
proximity to other public transport	2	1	0	0	0	0	0	1	0	2	1	0	0	0	0	0	1	0
access to power grid utilities	3	3	0	0	0	0	0	0	0	6	6	0	0	0	0	0	0	0
Activity #	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
Total Score:	91	65	45	59	50	80	81	100	80	124	86	56	68	54	93	92	118	96

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Ga (Gaspard) Sub-zone

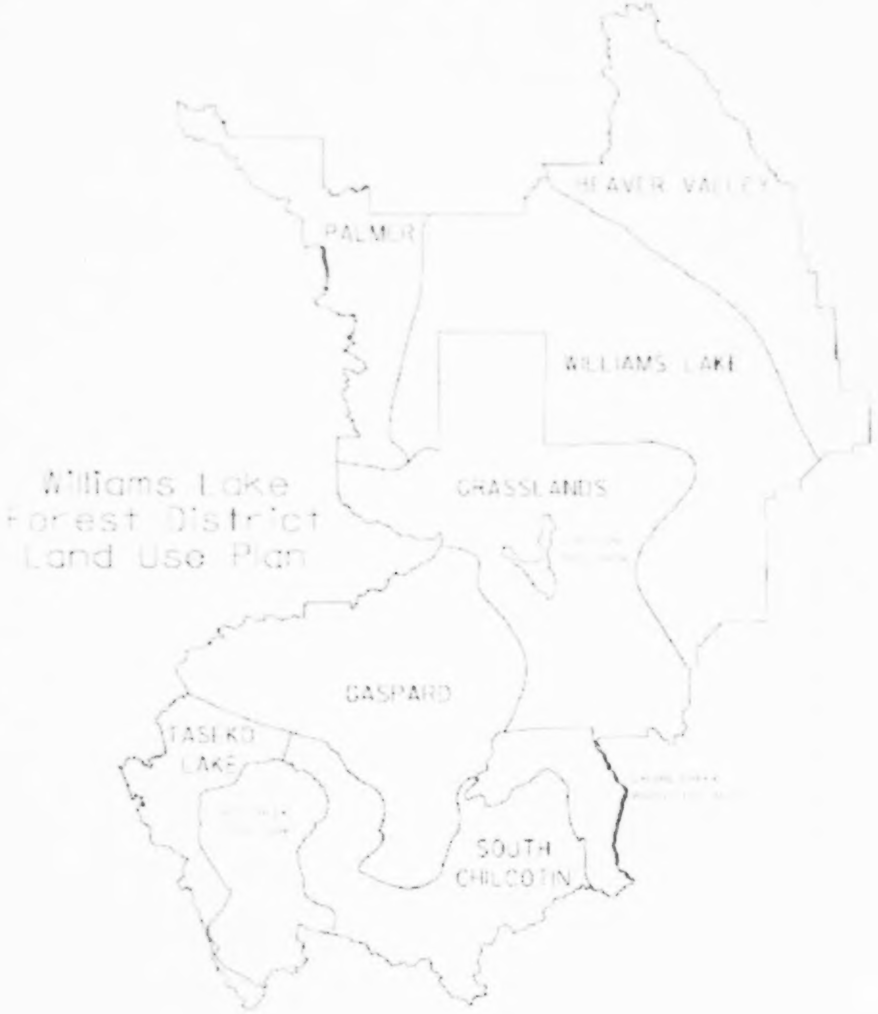
	Score for Activity/Product								
Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1. Geographic setting and resources									
scenic views and attractions	6	6	2	6	2	6	6	6	6
mid-country (somewhat remote)	9	3	3	6	6	6	6	6	6
back-country (remote)	0	0	1	1	2	3	2	1	0
abundant and varied wildlife	4	4	6	4	0	4	6	6	6
varied and scenic topography	4	4	2	6	4	4	6	6	4
alpine environments	2	0	0	1	2	2	1	3	2
proximity to rivers	6	4	6	2	0	2	4	0	4
proximity to lakes	3	2	3	1	0	1	2	1	2
proximity to open/rolling lands	0	9	0	6	0	3	3	9	6
2. Land uses									
proximity to parks or protected area	6	2	4	2	0	6	6	6	4
close proximity to logged areas	0	0	0	0	3	0	6	3	0
distance from logged areas	3	1	1	2	1	3	2	2	2
access to non-commercial side roads	0	0	1	1	3	3	2	2	3
limited facility development	3	0	3	3	6	9	9	6	6
3. Tourist activities									
proximity to varied winter activities	4	4	0	0	0	0	0	6	0
potential for diversified activity packages	3	2	0	0	0	0	0	3	1
potential for year-round activities	6	4	0	0	0	0	0	6	2
proximity to cultural features/activities	3	2	0	1	0	2	0	3	2
proximity to camping or huts	0	2	2	2	2	3	2	1	1
4. Services and amenities									
proximity to skilled labour source	3	2	0	0	0	0	0	0	0
proximity to extensive trail system	3	1	1	3	3	3	3	2	1
potential for circular trail/route development	3	0	0	9	9	9	6	6	9
abundant good quality off-highway roads	3	3	6	3	3	6	6	6	6
proximity to full service population centre	2	1	0	0	0	0	1	2	2
all weather road access	6	4	4	2	4	2	2	6	4
proximity to major highway access	3	1	0	0	1	1	0	1	3
proximity to airports	4	0	0	0	0	0	0	0	0
proximity to other public transport	2	1	0	0	0	0	0	1	0
access to power grid utilities	3	3	0	0	0	0	0	0	0
Activity #	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
Total Score:	94	65	45	61	51	78	81	100	82

TL (Taseko Lake) Sub-zone

	Score for Activity/Product								
Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1. Geographic setting and resources									
scenic views and attractions	9	9	3	9	3	9	9	9	9
mid-country (somewhat remote)	9	3	3	6	6	6	6	6	6
back-country (remote)	0	0	3	3	6	9	6	3	0
abundant and varied wildlife	6	6	9	6	0	6	9	9	9
varied and scenic topography	6	6	3	9	6	6	9	9	6
alpine environments	6	0	0	3	6	6	3	9	6
proximity to rivers	6	4	6	2	0	2	4	0	4
proximity to lakes	3	2	3	1	0	1	2	1	2
proximity to open/rolling lands	0	6	0	4	0	2	2	6	4
2. Land uses									
proximity to parks or protected area	9	3	6	3	0	9	9	9	6
close proximity to logged areas	0	0	0	0	3	0	6	3	0
distance from logged areas	9	3	3	6	3	9	6	6	6
access to non-commercial side roads	0	0	2	2	6	6	4	4	6
limited facility development	3	0	3	3	6	9	9	6	6
3. Tourist activities									
proximity to varied winter activities	6	6	0	0	0	0	0	9	0
potential for diversified activity packages	6	4	0	0	0	0	0	6	2
potential for year-round activities	9	6	0	0	0	0	0	9	3
proximity to cultural features/activities	9	6	0	3	0	6	0	9	6
proximity to camping or huts	0	6	6	6	6	9	6	3	3
4. Services and amenities									
proximity to skilled labour source	3	2	0	0	0	0	0	0	0
proximity to extensive trail system	6	2	2	6	6	6	6	4	2
potential for circular trail/route development	1	0	0	3	3	3	2	2	3
abundant good quality off-highway roads	1	1	2	1	1	2	2	2	2
proximity to full service population centre	2	1	0	0	0	0	1	2	2
all weather road access	3	2	2	1	2	1	1	3	2
proximity to major highway access	3	1	0	0	1	1	0	1	3
proximity to airports	2	0	0	0	0	0	0	0	0
proximity to other public transport	2	1	0	0	0	0	0	1	0
access to power grid utilities	3	3	0	0	0	0	0	0	0
Activity #	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
Total Score:	122	83	56	77	64	108	102	131	98

SC (South Chilcotin) Sub-zone

		Score for Activity/Product								
Criteria		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1. Geographic setting and resources										
scenic views and attractions		9	9	3	9	3	9	9	9	9
mid-country (somewhat remote)		9	3	3	6	6	6	6	6	6
back-country (remote)		0	0	3	3	6	9	6	3	0
abundant and varied wildlife		4	4	6	4	0	4	6	6	6
varied and scenic topography		6	6	3	9	6	6	9	9	6
alpine environments		6	0	0	3	6	6	3	9	6
proximity to rivers		6	4	6	2	0	2	4	0	4
proximity to lakes		3	2	3	1	0	1	2	1	2
proximity to open/rolling lands		0	9	0	6	0	3	3	9	6
2. Land uses										
proximity to parks or protected area		9	3	6	3	0	9	9	9	6
close proximity to logged areas		0	0	0	0	2	0	4	2	0
distance from logged areas		6	2	2	4	2	6	4	4	4
access to non-commercial side roads		0	0	1	1	3	3	2	2	3
limited facility development		3	0	3	3	6	9	9	6	6
3. Tourist activities										
proximity to varied winter activities		6	6	0	0	0	0	0	9	0
potential for diversified activity packages		6	4	0	0	0	0	0	6	2
potential for year-round activities		9	6	0	0	0	0	0	9	3
proximity to cultural features/activities		9	6	0	3	0	6	0	9	6
proximity to camping or huts		0	6	6	6	6	9	6	3	3
4. Services and amenities										
proximity to skilled labour source		3	2	0	0	0	0	0	0	0
proximity to extensive trail system		9	3	3	9	9	9	9	6	3
potential for circular trail/route development		1	0	0	3	3	3	2	2	3
abundant good quality off-highway roads		1	1	2	1	1	2	2	2	2
proximity to full service population centre		2	1	0	0	0	0	1	2	2
all weather road access		3	2	2	1	2	1	1	3	2
proximity to major highway access		6	2	0	0	2	2	0	2	6
proximity to airports		2	0	0	0	0	0	0	0	0
proximity to other public transport		2	1	0	0	0	0	0	1	0
access to power grid utilities		3	3	0	0	0	0	0	0	0
	Activity #	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
	Total Score:	123	85	52	77	63	105	97	129	96

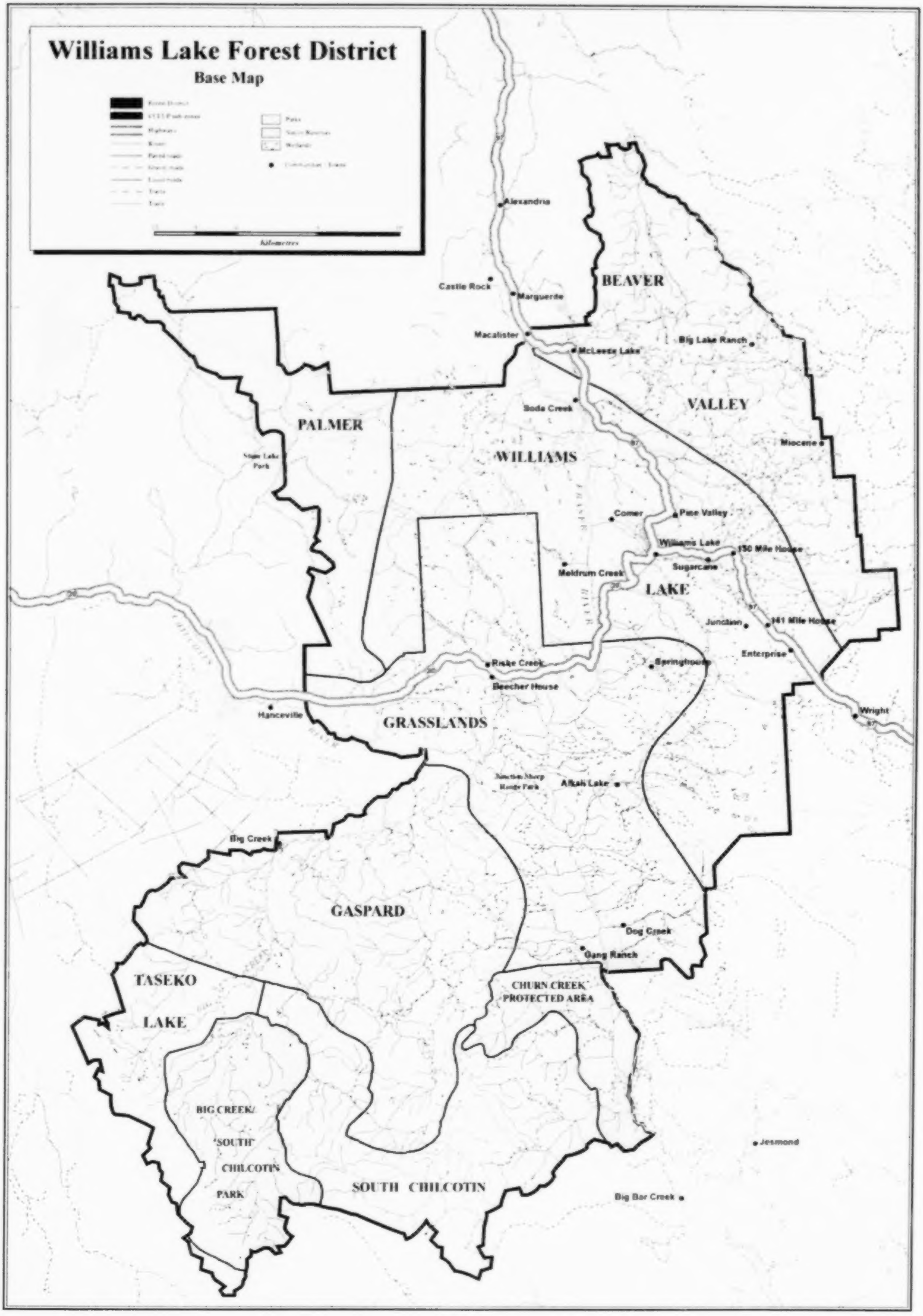


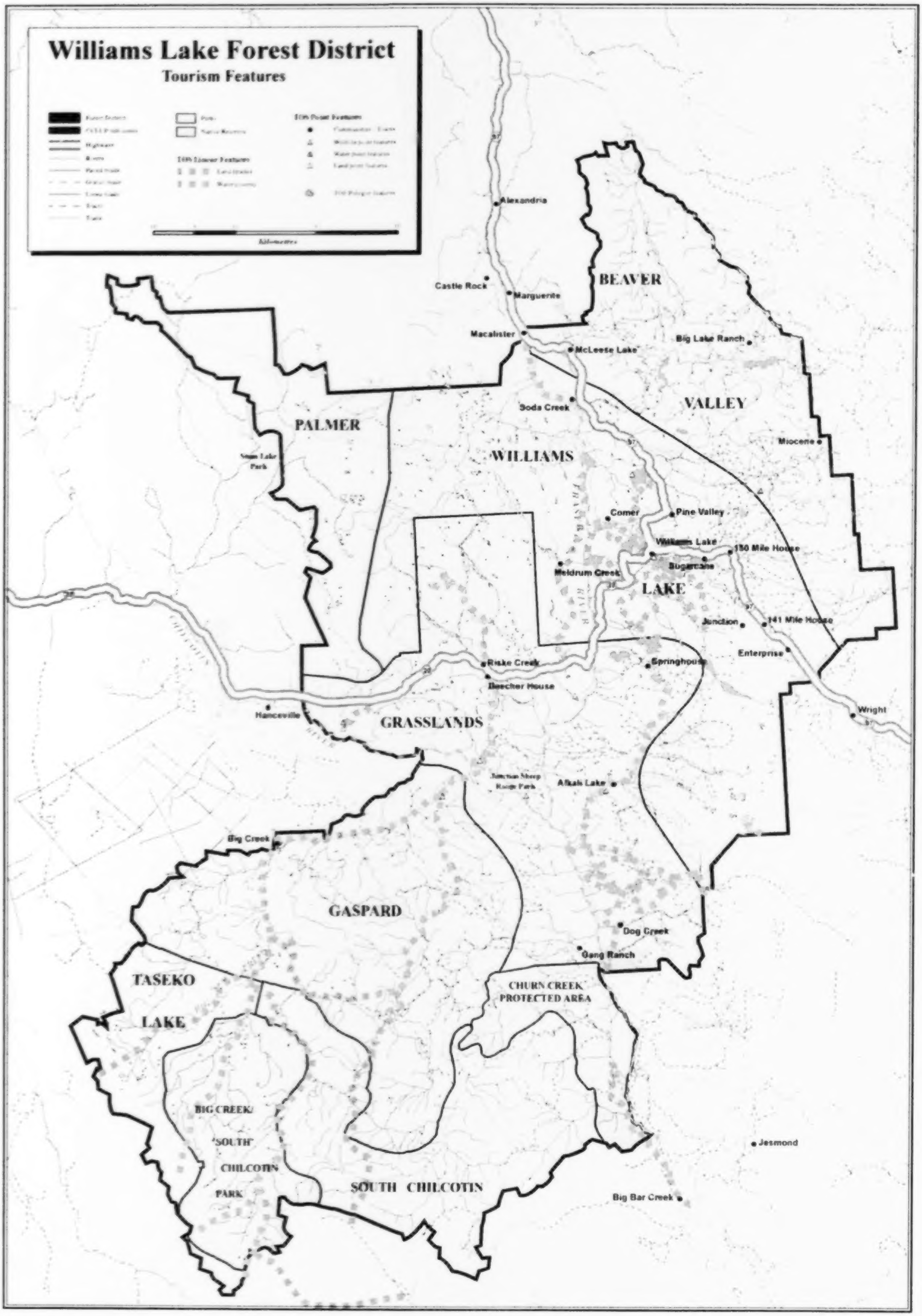
Williams Lake Forest District Land Use Plan

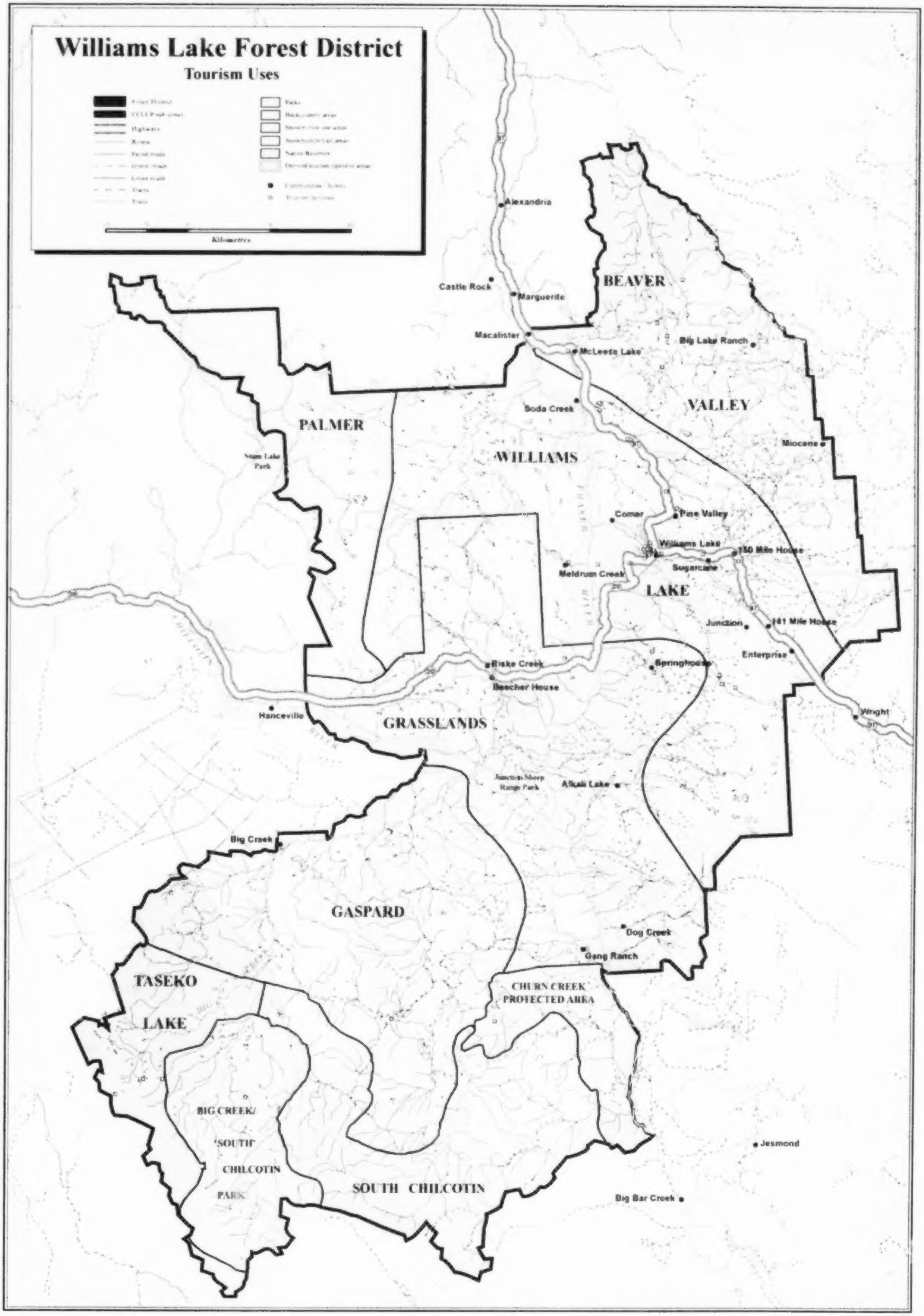
BEAVER VALLEY
PALMER
WILLIAMS LAKE
GRASSLANDS
GASPARD
TASEKO LAKE
SOUTH CHILCOTIN

The following provides a description of the maps of the Williams Lake study area attached in this Appendix:

- **Study Area Base Map** – provides base mapping data for the study area, including the boundaries of the Williams Lake Forest District and the CCLUP sub-zones.
- **Tourism Features Map** – illustrates tourism linear features, point features and polygon features in the study area, which consist of locations, routes or settings important to tourism operators.
- **Tourism Existing Uses Map** – illustrates tourism point facilities, which are the principal facilities or bases of tourism operators, and tourism use areas, which are areas identified as being used for tourism purposes by tourism operators.
- **Potential Destination Lodge Locations Map** – illustrates the general areas that may be suitable for a destination lodge.
- **Freshwater Fishing Map** – illustrates lakes that have moderate and high/very high sport fishing ratings.


Williams Lake Forest District
Base Map
Highways
Parks
Wetlands
Kilometres
Alexandria
Castle Rock
Marguerite
BEAVER
Macalister
McLeese Lake
Big Lake Ranch
Soda Creek
VALLEY
PALMER
Stum Lake Park
WILLIAMS
Miocene
Comer
Pine Valley
Williams Lake
150 Mile House
Sugarcane
Meldrum Creek
LAKE
26
97
20
Junction
141 Mile House
Enterprise
Riske Creek
Springhouse
Beecher House
Hanceville
GRASSLANDS
Wright
Junction Sheep Range Park
Alkali Lake
Big Creek
GASPARD
Dog Creek
Gang Ranch
TASEKO
LAKE
CHURN CREEK PROTECTED AREA
BIG CREEK/
'SOUTH'
CHILCOTIN
PARK
SOUTH CHILCOTIN
Jesmond
Big Bar Creek

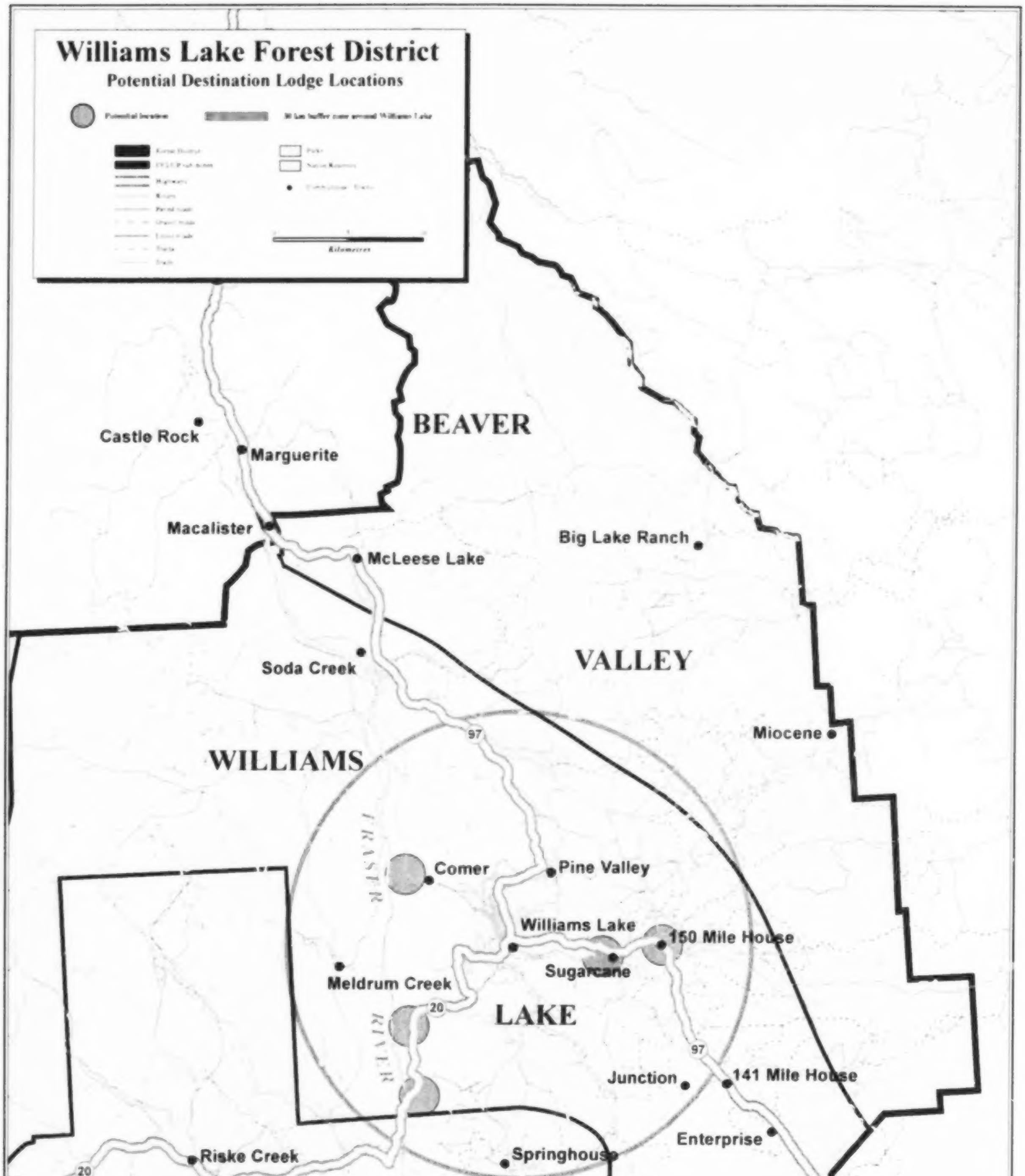

Williams Lake Forest District
Tourism Features
Kilometres
Alexandria
Castle Rock
Marguerite
BEAVER
Macalister
McLeese Lake
Big Lake Ranch
VALLEY
PALMER
Soda Creek
Miocene
Stum Lake Park
WILLIAMS
FRASER RIVER
Comer
Pine Valley
Williams Lake
150 Mile House
Sugarcane
Meldrum Creek
LAKE
Junction
141 Mile House
Enterprise
CHILCOTIN
Riske Creek
Springhouse
Beecher House
Hanceville
GRASSLANDS
Wright
Junction Sheep Range Park
Alkali Lake
Big Creek
GASPARD
Dog Creek
Gang Ranch
TASEKO
LAKE
CHURN CREEK PROTECTED AREA
BIG CREEK/ 'SOUTH' CHILCOTIN PARK
Jesmond
SOUTH CHILCOTIN
Big Bar Creek
97
20

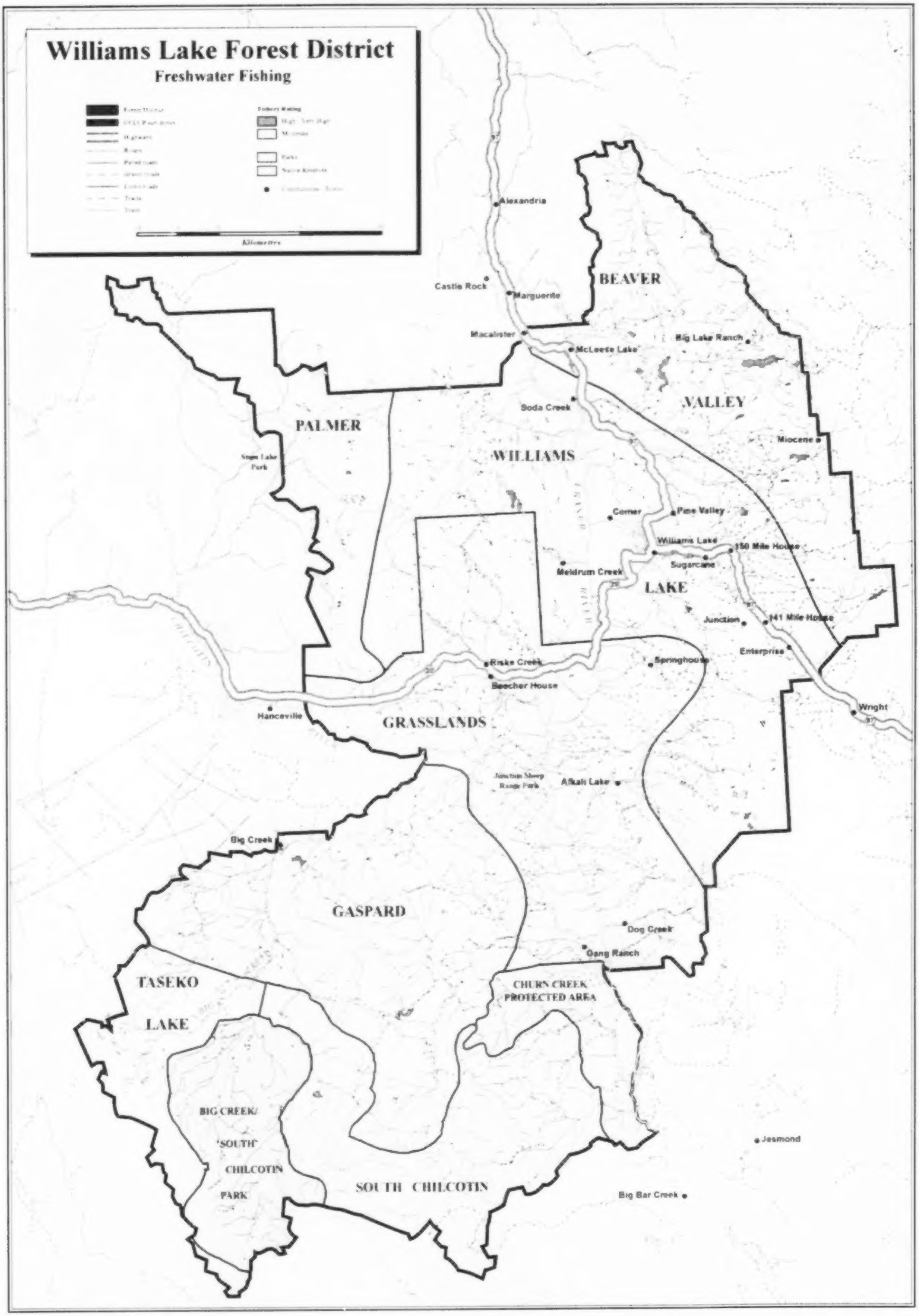


Williams Lake Forest District

Tourism Uses

Highways
Rivers
Parks
Tracks
Trails
Kilometres
Alexandria
Castle Rock
Marguerite
BEAVER
Macalister
McLeese Lake
Big Lake Ranch
Soda Creek
VALLEY
PALMER
Miocene
Stum Lake Park
WILLIAMS
Comer
Pine Valley
Williams Lake
150 Mile House
Meldrum Creek
Sugarcane
LAKE
Junction
141 Mile House
Enterprise
Riske Creek
Springhouse
Beecher House
Hanceville
Wright
GRASSLANDS
Junction Sheep Range Park
Alkali Lake
Big Creek
GASPARD
Dog Creek
Gang Ranch
TASEKO
LAKE
CHURN CREEK PROTECTED AREA
BIG CREEK/ 'SOUTH' CHILCOTIN PARK
SOUTH CHILCOTIN
Jesmond
Big Bar Creek
97
20


Williams Lake Forest District
Potential Destination Lodge Locations
Potential location
30 km buffer zone around Williams Lake
Kilometres
BEAVER
VALLEY
WILLIAMS
LAKE
GRASSLANDS
FRASER RIVER
Castle Rock
Marguerite
Macalister
McLeese Lake
Big Lake Ranch
Soda Creek
Miocene
97
Comer
Pine Valley
Williams Lake
150 Mile House
Sugarcane
Meldrum Creek
20
97
Junction
141 Mile House
Enterprise
Riske Creek
Springhouse
20
Beecher House
Wright
97
Junction Sheep Range Park
Alkali Lake


Williams Lake Forest District
Freshwater Fishing
Forest District
Highways
Rivers
Paved roads
Gravel roads
Tracks
Trails
Fishery Rating
High - Very High
Moderate
Parks
Nature Reserves
Kilometres
Alexandria
Castle Rock
Marguerite
BEAVER
Macalister
McLeese Lake
Big Lake Ranch
VALLEY
Soda Creek
PALMER
Stum Lake Park
WILLIAMS
Miocene
Comer
Pine Valley
Williams Lake
150 Mile House
Sugarcane
Meldrum Creek
LAKE
Junction
141 Mile House
Riske Creek
Springhouse
Enterprise
Beecher House
Hanceville
GRASSLANDS
Wright
Junction Sheep Range Park
Alkali Lake
Big Creek
GASPARD
Dog Creek
Gang Ranch
TASEKO
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CHURN CREEK PROTECTED AREA
BIG CREEK/ 'SOUTH' CHILCOTIN PARK
Jesmond
SOUTH CHILCOTIN
Big Bar Creek
97
20
FRASER RIVER